

# Agency Approver Manual

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## Internal Supplier Registration

### Supplier Maintenance

**Contents**

- Introduction..... 1
- Navigating to Review Internal Supplier Registrations ..... 3
  - Worklist Navigation ..... 3
  - Manage Request Approval Navigation ..... 5
- Reviewing an Internal Supplier Registration ..... 7
  - Review Page ..... 8
    - Your Supplier Registration Information ..... 9
    - Identification & Classification ..... 9
    - Primary Address..... 10
    - Profile Questions ..... 11
    - Contact Information ..... 16
  - Manage Request Approval..... 18
- New vs. Existing Suppliers ..... 21
- Appendix A: Internal Supplier Registration Workflow ..... 23
- Appendix B: Dos and Don'ts ..... 24
- Appendix C: General IRS W-9 Requirements ..... 26
- Appendix D: Supplier Maintenance IRS W-9 Summary Instructional Table ..... 27
- Appendix E: Address Standards ..... 28
- Appendix F: Edison Locations for 1099 Reporting ..... 31
- Appendix G: Queries ..... 32

## 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](mailto: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.**

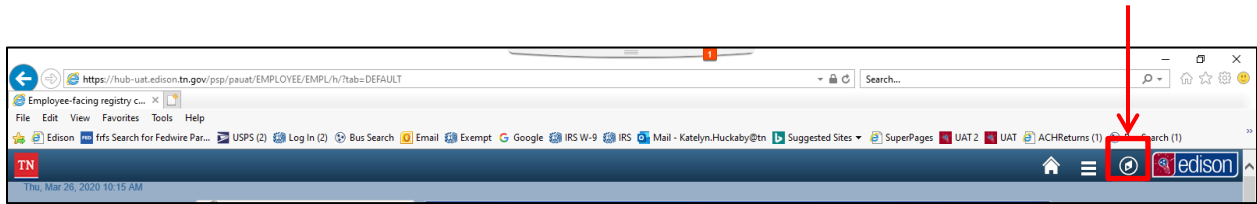
# Navigating to Review Internal Supplier Registrations

There are two paths to view submitted supplier registrations:

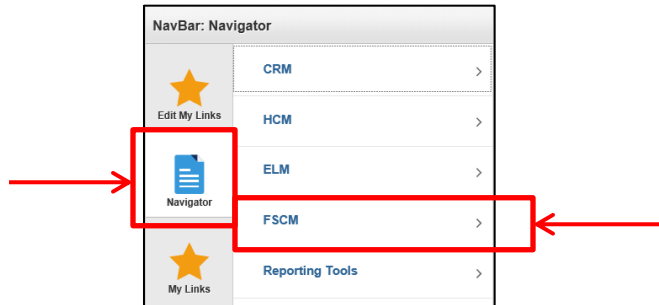
1. Worklist
2. Manage Request Approval

## Worklist Navigation

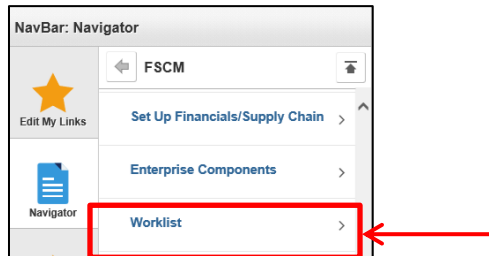
1. Click the **NavBar** icon at the top of your screen:



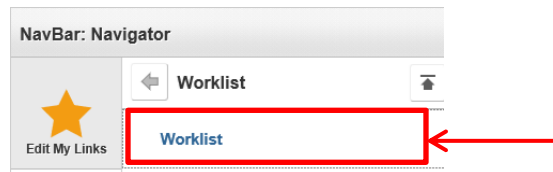
2. Click the **Navigator** icon, and then click **FSCM** from the menu.



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

The screenshot shows the "Worklist" screen for user Stacy Turner. It includes a search section for "AP Voucher\_Search" with fields for Business Unit, Voucher ID (From/To), and buttons for "Clear" and "Search". Below this is a "Worklist Filters" dropdown and a "Feed" icon. The main section is titled "Worklist Items" and contains a table with the following data:

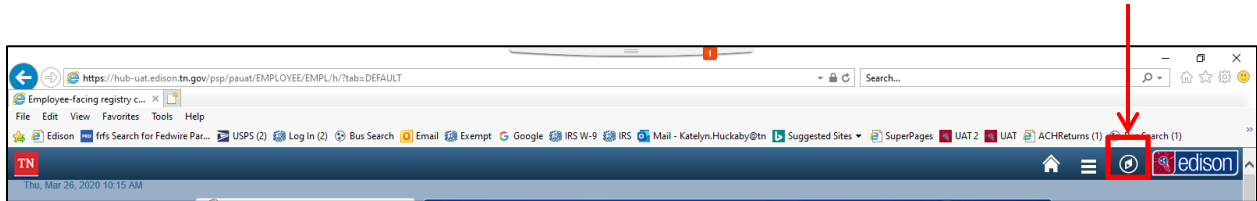
From	Date From	Work Item	Worked By Activity	Priority	Link
Jane Doe	6/2/2020	Approval Routing	Approval Workflow	3-Low	<a href="#">SUP_OB_SUPPLIER_8095_SHARE_2019-01-08_N_0_SETID:SHARE SUP_OB_REG_ID:0000007462</a>

Annotations on the screenshot:

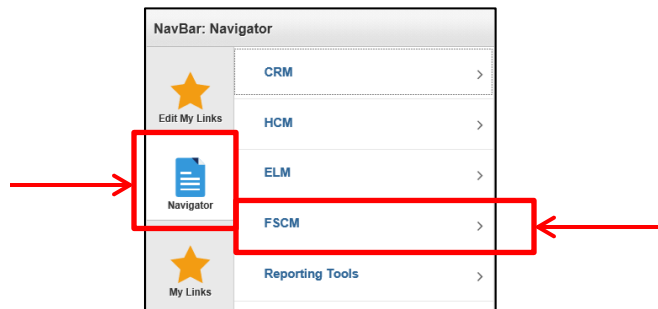
- A red box labeled "7." points to the "Work Item" header in the table.
- A red box labeled "8." points to the link in the "Link" column of the first row.
- A blue box on the right contains the text: "Links which include 'REG ID: XXXXXXXXXXXX' are supplier registrations submitted through the Internal Supplier Registration by the Agency Submitter." A blue arrow points from this box to the link in the table.

## Manage Request Approval Navigation

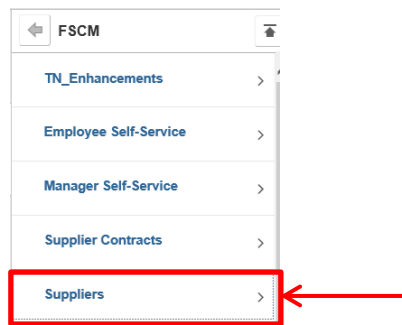
1. Click the **NavBar** icon at the top of your screen:



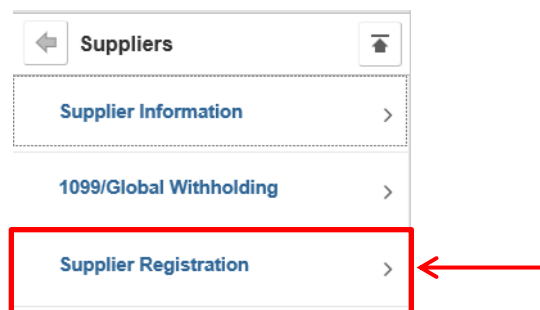
2. Click the **Navigator** icon, and then click **FSCM** from the menu.



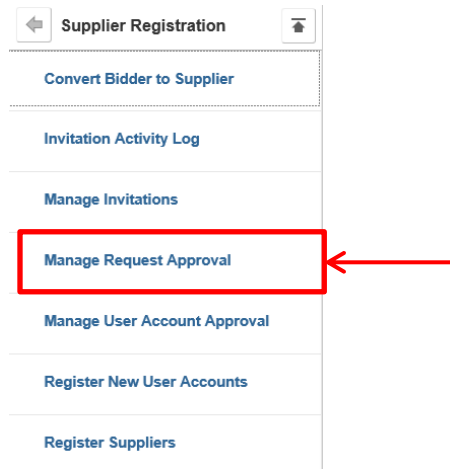
3. Click **Suppliers**



4. Click **Supplier Registration**



## 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.

A screenshot of the 'Manage Request Approval' search results page. The page has a search criteria section with the following fields: 'Request Type' (set to 'Register New Suppliers'), 'Initiated by' (set to 'Internal'), 'SetID' (set to 'SHARE'), 'Status' (set to 'Pending Approval'), 'Registration ID', 'Date From', 'Date To', and 'Company Name'. There are 'Search' and 'Clear' buttons. Below the search criteria is a 'Search Result' table with one entry. Red boxes and arrows highlight the following steps: 6. Select 'Register New Suppliers' (pointing to the Request Type dropdown), 7. Select 'Internal' (pointing to the Initiated by dropdown), 8. Click Search (pointing to the Search button), and 9. Click Registration ID link (pointing to the Registration ID link in the table row).

**6. Select "Register New Suppliers"**

**7. Select "Internal"**

**8. Click Search**

**9. Click Registration ID link**

Select	Status	Registration ID	Company Name	Request Type	Date	Submitter	Business Unit
<input type="checkbox"/>	Pending Approval	<a href="#">000007462</a>	ABC COMPANY	Register New Suppliers	6/2/2020	Jane Doe	30101



# Reviewing an Internal Supplier Registration

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

The screenshot shows the 'Manage Request Approval' page with a 'Registration Details' link highlighted. The page displays registration information for 'ABC COMPANY' with a registration ID of 0000007462. The registration was entered on 6/2/2020 and is currently in a 'Pending Approval' status. The submitter is Jane Doe, and the business unit is 30101. The address is 352 EDISON DR, NASHVILLE, TN 37512-7856. The tax identification number is 999999999. The page also includes sections for 'Identification & Classification' and 'Standard Industrial Codes'.

**1. Click Registration Details link**

Uniquely identifies the registration.

Supplier Name entered by Agency Submitter.

Date the registration was started.

Current status of the registration.

W-9 address entered by the Agency Submitter.

Tax ID entered by the Agency Submitter.

Email address entered by Agency Submitter that will receive communications regarding the registration.

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.

SIC Code Type	Code	Description
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## 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.

**Review Page**

### Your Supplier Registration Information

Registration ID	000007462
Entered on	6/2/2020
Status	Pending
Company Name	ABC COMPANY
SetID	32101

### Supplier Relationships

Corporate Supplier	N
Corporate SetID	
Corporate Supplier	

### Identification & Classification

Tax Identification Number	999999999
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### Government Classifications

EEO Certification Date  HUB Zone

Certification Source	Certificate Begin Date	Certificate Expiration	Government Classification	Certification Number
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### Profile Questions

\* 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. 1

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\* 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 [www.irs.gov](http://www.irs.gov), that is hand-signed and dated within a year from the submission date, will be accepted. If an accepta

[Attachment](#) ←

**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.

Review Page	
<b>Your Supplier Registration Information</b>	
	Registration ID 0000007475
	Entered on 06/17/2020
	Status Pending
<b>4. Must match Line 1 of W-9, ALL CAPS</b>	<b>Company Name</b> ABC COMPANY
	SetID 32101

## 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.

<b>5. Must match Part I of W-9, no dashes</b>	<b>Identification &amp; Classification</b>
	Tax Identification Number 999999999

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.

Review Page			
<b>Address Information</b>			
<b>8. Must match address on W-9, ALL CAPS</b>	* Primary Address	Main Address	
	Description	USA United States	
	Country	352 EDISON DR	
	*Address 1		
	Address 2		
	Address 3		
	City	NASHVILLE	
	County		Postal 37512-7856
	*State	TN	
	Email ID		

## 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:**

<b>Supplier Registration</b>
* 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.

- 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:

<b>Review Page</b>
<b>Profile Questions</b>
* 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. <span style="float: right;">1</span>

b. **Second Profile Question:**

<b>Supplier Registration</b>
* 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.

- 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.

- 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.**

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 a

[Attachment](#) ←

**c.i. Click Attachment** link to review remittance address documentation uploaded

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.

**Review Page**

<b>Description</b>	<b>Main Address</b>		
Country	USA	United States	
Address 1	352 EDISON DR		
Address 2			
Address 3			
City	NASHVILLE		
County		Postal	37512-7856
State	TN		
Email ID			

<b>Description</b>	<b>Remit To Address</b>		
Country	USA	United States	
Address 1	PO BOX 1452		
Address 2			
Address 3			
City	NASHVILLE		
County		Postal	35214-7852
State	TN		
Email ID			

**c.i. Must match** address on remittance address documentation, **ALL CAPS**

d. **Fourth Profile Question:**

<b>Supplier Registration</b>
* 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, Accountin	CAT6-Med/Health Care Pymts-treatment mind & body, veterinary; MAIN-Non-Reportable-products, travel, utilities, dues
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e. **Fifth Profile Question:**

<b>Supplier Registration</b>
* 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
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**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.

<p>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 E</p>	<p><a href="#">Attachment</a></p>	<p><b>g.i. Click Attachment</b> link to review employee documentation uploaded</p>
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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:

	A	B	C	D
1	Name	Social Security Number	Position within the firm	Ownership Interest
2	Peter Jones	111-11-1111	CEO	25%

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.

Date of Incorporation, if applicable.
State of Incorporation, If applicable.
Has a performance penalty ever been assessed against the organization or any of the principle owners?

## 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.

**10. Contact Name should be “Internal” and Contact Type should be “General”**

Contact Information	
* Primary Contact	
Description	
Contact Name	INTERNAL
Contact Type	General
Email ID	

Phone Information			
Type	Prefix	Telephone	Ext
Business Phone			

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.

**11. Click Return**

Agency Submitter was instructed to leave the Comments field blank.

Return

Payment Preferences

Supplier Banking Attachments  
[View Attachment](#)

Supplier URL Information

URLID	Description
1	

Comments

Comments

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.

**Manage Request Approval**

Registration ID: 000000746  
Company Name: ABC COMPANY  
Email ID: jane.doe@tn.gov  
Country: USA United States  
Address: 352 EDISON DR  
City: NASHVILLE Postal: 37512-7856 State: TN  
Entered on: 6/2/2020  
Approval Status: Pending Approval  
SetID: SHARE  
Submitter: Jane Doe  
Business Unit: 30101

**Identification & Classification**

Tax Identification Number 999999999

**Standard Industrial Codes**

SIC Code Type	Code	Description
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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.

**13.** Click one of the action buttons based on what your review found

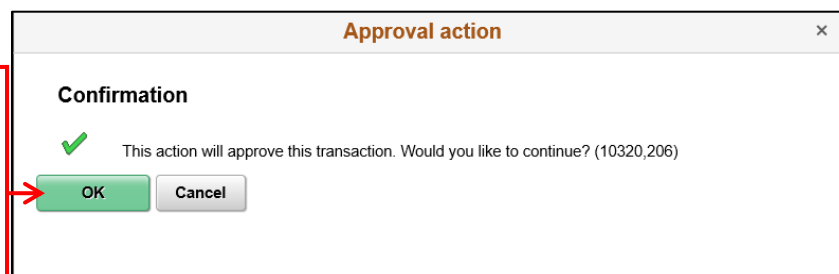


Each action is detailed below:

- 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.

**13a.** Click **OK** to approve the registration and 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.

The screenshot shows a pop-up window titled "Approval action" with a close button (X) in the top right corner. The main heading is "Deny Transaction". Below the heading is a green checkmark icon and the text: "Select 'Cancel' anytime to go back. To continue, please enter your reasons for the request action then select 'OK'". There are two input fields: "Reason Code" with the value "DENY" and a search icon, and "Comment" with the text "From Agency Approver: XXXXXXXX" and a text icon. At the bottom are "OK" and "Cancel" buttons. Three red callout boxes with arrows point to these elements:

- 13b. Enter "DENY".** (Points to the Reason Code field)
- 13b. Enter your name/initials and ALL of the reasons you are denying the registration** (Points to the Comment field)
- 13b. Click OK to deny and terminate the registration.** (Points to the OK button)

- 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.

The screenshot shows a pop-up window titled "Approval action" with a close button (X) in the top right corner. The main heading is "Request More Information". Below the heading is a green checkmark icon and the text: "Select 'Cancel' anytime to go back. To continue, please enter your reasons for the request action then select 'OK'". There are two input fields: "Reason Code" with the value "RMI" and a search icon, and "Comment" with the text "From Agency Approver: XXXXXXXX" and a copy icon. At the bottom are two buttons: "OK" and "Cancel". Three red boxes with arrows point to the form elements: the first points to the Reason Code field with the text "13c. Enter 'RMI'."; the second points to the Comment field with the text "13c. Enter your name/initials and ALL of the reasons you are requesting more information"; the third points to the OK button with the text "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.

The screenshot shows the 'Review Suppliers' interface. The 'Search Criteria' section includes fields for \*SetID (SHARE), Name (Equal to), Withholding Name (Equal to), Supplier Status, Address (Equal to), Customer Number, ID Type (Tax Identification Number), VAT Registration ID, and Withholding Tax ID. The 'Tax Identification Number' field contains the value '999999999'. A red box highlights the 'Search' button with the text '2. Click Search'. Another red box highlights the 'Tax Identification Number' field with the text '2. Enter the supplier's tax ID, no dashes' and a red arrow pointing to the field.

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":

The screenshot shows the 'Review Suppliers' interface. At the top, there is a navigation bar with '< Vendor Lookup' on the left and 'Review Suppliers' on the right. Below this, the title 'Review Suppliers' is displayed. Underneath the title, the text 'Search Criteria' is visible. The search criteria are organized into several sections:

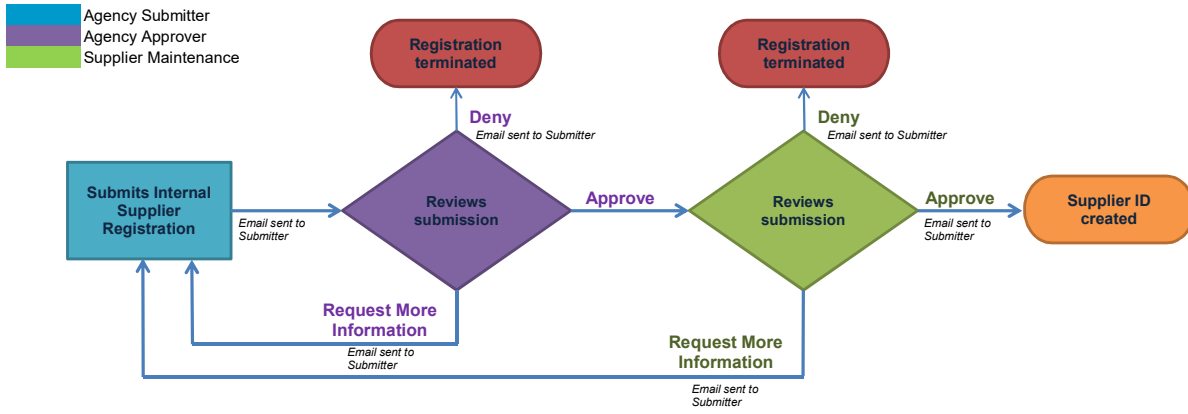
- \*SetID:** A text input field containing 'SHARE' and a search icon.
- Name:** A dropdown menu set to 'Equal to' and an empty text input field.
- Withholding Name:** A dropdown menu set to 'Equal to' and an empty text input field.
- Supplier Status:** A dropdown menu.
- Address:** A dropdown menu set to 'Equal to' and an empty text input field.
- Customer Number:** An empty text input field.
- ID Type:** A dropdown menu set to 'Tax Identification Number' and a text input field containing '999999999'.
- VAT Registration ID:** An empty text input field.
- Withholding Tax ID:** An empty text input field.
- Supplier ID:** An empty text input field.
- Short Name:** A dropdown menu set to 'Equal to' and an empty text input field.
- Classification:** An empty text input field.
- Type:** An empty text input field.
- Persistence:** An empty text input field.
- City:** An empty text input field.
- Country:** An empty text input field.
- State:** An empty text input field.
- Postal:** An empty text input field.
- Bank Account #:** An empty text input field.

At the bottom left, there is a 'Max Rows' field set to '300'. At the bottom right, there is a 'Search' button. Below the search criteria, a message is displayed: "There are no rows available that meet your search criteria." This message is circled in blue in the original 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



## 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](mailto:Supplier.Maintenance@tn.gov) and include in the Subject "FOREIGN"
- ✓ Do ensure the IRS W-9 is:
  - Legible and not altered
  - The current version of the IRS W-9
  - Completed according to the IRS W-9 instructions which includes only one TIN in Part I
  - Hand-signed
  - Dated within a year of the submission date
  - 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:
  - Be an invoice to or from the supplier or hand-signed memo on company letterhead
  - Be legible and not altered
  - Contain the supplier's Name or Doing Business As (DBA) name that appears on W-9
  - Contain a complete address
  - 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](mailto: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](http://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:

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

**Request for Taxpayer Identification Number and Certification**  
▶ Go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9) for instructions and the latest information.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.  
**State of Tennessee**

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.

Individual/sole proprietor or single-member LLC     C Corporation     S Corporation     Partnership     Trust/estate

Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶

Other (see instructions) ▶ **State Government**

Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.

- 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

When <b>ONE</b> of the following federal tax classifications below is checked in Line 3 of the IRS W-9...	Complete each Line and Part of the IRS W-9 per the IRS W-9 instructions as follows:						
↓	Line 1 <i>Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.</i>	Line 2 <i>Business name/ disregarded entity name</i>	Additional Line 3 <b>Requirements</b>	Line 4	Lines 5 & 6 <i>Address (number, street, and apt. or suite no.) City, state, and ZIP code</i>	Part I: Taxpayer Identification Number (TIN) <i>The TIN provided must match the name given on line 1 to avoid backup withholding.</i>	Part II: Certification
<b>Individual/sole proprietor or single-member LLC</b>  <i>(single-member LLC owned by an individual and disregarded for U.S. federal tax purposes)</i>	<b>Individual:</b> 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.  <b>Sole proprietor or single-member LLC:</b> Enter your individual name as shown on your 1040/1040A/1040EZ	If you have a business name, trade name, DBA name, or disregarded entity name (LLC), you may enter it on line 2.	N/A	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.	Enter your address (number, street, and apartment or suite number). This is where the requester of this Form W-9 will mail your information returns. If this address differs from the one the requester already has on file, write NEW at the top.	Enter the individual's SSN OR EIN. <b>Do not enter both.</b>  <b>Do not enter the disregarded entity's (LLC's) EIN.</b>	As allowed by the IRS W-9 instructions, the State of Tennessee requires a hand-written signature.
<b>C Corporation</b>	Enter the entity's name as shown on the entity's tax return	If you have a business name, trade name, DBA name, or disregarded entity name (LLC), you may enter it on line 2.	N/A	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.	Enter your address (number, street, and apartment or suite number). This is where the requester of this Form W-9 will mail your information returns. If this address differs from the one the requester already has on file, write NEW at the top.	Enter the corporation's EIN	As allowed by the IRS W-9 instructions, the State of Tennessee requires a hand-written signature.
<b>S Corporation</b>	Enter the entity's name as shown on the entity's tax return	If you have a business name, trade name, DBA name, or disregarded entity name (LLC), you may enter it on line 2.	N/A	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.	Enter your address (number, street, and apartment or suite number). This is where the requester of this Form W-9 will mail your information returns. If this address differs from the one the requester already has on file, write NEW at the top.	Enter the corporation's EIN	As allowed by the IRS W-9 instructions, the State of Tennessee requires a hand-written signature.
<b>Partnership</b>	Enter the entity's name as shown on the entity's tax return	If you have a business name, trade name, DBA name, or disregarded entity name (LLC), you may enter it on line 2.	N/A	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.	Enter your address (number, street, and apartment or suite number). This is where the requester of this Form W-9 will mail your information returns. If this address differs from the one the requester already has on file, write NEW at the top.	Enter the partnership's EIN	As allowed by the IRS W-9 instructions, the State of Tennessee requires a hand-written signature.
<b>Trust/Estate</b>	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.	If you have a business name, trade name, DBA name, or disregarded entity name (LLC), you may enter it on line 2.	N/A	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.	Enter your address (number, street, and apartment or suite number). This is where the requester of this Form W-9 will mail your information returns. If this address differs from the one the requester already has on file, write NEW at the top.	For usual revocable savings trust, enter the <u>grantor-trustee's SSN</u> . For so-called trust account that is not a legal or valid trust under state law, enter the <u>actual owner's SSN</u> . For a valid trust, estate, or pension trust, enter the <u>legal entity's EIN</u> .	As allowed by the IRS W-9 instructions, the State of Tennessee requires a hand-written signature.
<b>Limited liability company</b>  <i>(LLC treated as a partnership, corporation, or the owner is another LLC that is not disregarded for U.S. federal tax purposes)</i>	Enter the entity's name as shown on the entity's tax return	If you have a business name, trade name, DBA name, or disregarded entity name (LLC), you may enter it on line 2.	Enter the tax classification (C=C corporation, S=S corporation, P=Partnership)	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.	Enter your address (number, street, and apartment or suite number). This is where the requester of this Form W-9 will mail your information returns. If this address differs from the one the requester already has on file, write NEW at the top.	Enter the entity's EIN	As allowed by the IRS W-9 instructions, the State of Tennessee requires a hand-written signature.
<b>Other</b>	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.	If you have a business name, trade name, DBA name, or disregarded entity name (LLC), you may enter it on line 2.	Enter an explanation for your federal tax classification. For example, government entity or 501c3.	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.	Enter your address (number, street, and apartment or suite number). This is where the requester of this Form W-9 will mail your information returns. If this address differs from the one the requester already has on file, write NEW at the top.	Enter the entity's EIN	As allowed by the IRS W-9 instructions, the State of Tennessee requires a hand-written signature.

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](http://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

W-9 Street Address	Street Address Entered in Registration and Supplier Update Form	USPS Publication 28 Source
851 Allison Street	851 ALLISON ST	Appendix C > C1 Street Suffix Abbreviations
123 Church	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	2 Postal Addressing Standards
6521 CO 33	6521 COUNTY ROAD 33	Appendix F
95 HWY 64	95 HIGHWAY 64	Appendix F
256 Princeton Drive Apartment 125 B	256 PRINCETON DR APT 125B  <i>(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)</i>	Appendix C > C2 Secondary Unit Designators and Appendix I > I2 Address Formats > I22 Apartment Buildings and Condominiums
Post Office Box 125	PO BOX 125	2 Postal Addressing Standards > 28 Post Office Box Addresses
651 Crown Drive, PO Box 3	Get a new W-9 from supplier showing only <b><u>one</u></b> complete address. New W-9 shows: PO BOX 3	2 Postal Addressing Standards > 21 General > 215 Dual Addresses <i>(State of Tennessee is eliminating the use of dual addresses)</i>



**Appendix F:**  
**Edison Locations for 1099 Reporting**

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

## 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**.

- TN\_INT\_SUP\_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 <input style="width: 50px;" type="text" value="32701"/>
<input type="button" value="View Results"/>

**Results:**

BU	Registration ID	Supplier Name	Last four digits of TIN	Registration ID Created by	Email Address of Submitter	Date/Time Registration Created	Date/Time Reg Last Modified
32701	0000008940	testing testing	4952	samad0103001	sam.smith@tn.gov	7/17/2020 23:17	7/17/2020 23:17
32701	0000008936	sup 123 123	4999	matti1008001	matt.jackson@tn.gov	7/17/2020 10:14	7/17/2020 11:57

- 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: <input style="width: 50px;" type="text" value="07/01/2020"/>
Date To: <input style="width: 50px;" type="text" value="07/28/2020"/>
Business Unit: <input style="width: 50px;" type="text" value="32901"/>
<input type="button" value="View Results"/>

**Results:**

BU	Registration ID	Supplier Name	Last four digits of TIN	Registration Submitted By	Email Address of Submitter	Date/Time Agency Submitted Reg
32901	0000008928	King Enterprise	8217	saraw0805001	sarah.johnson@tn.gov	7/16/2020 9:14
32901	0000008929	Muse Makings	2179	saraw0805001	sarah.johnson@tn.gov	7/16/2020 9:17
32901	0000008934	JTM Enterprise	5845	saraw0805001	sarah.johnson@tn.gov	7/16/2020 15:02

**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:

Date To:

Business Unit:

**Results:**

BU	Registration ID	Supplier Name	Last four digits of TIN	Registration Submitted By	Email Address of Submitter	Date/Time Agency Submitted Reg	Approver	Action taken by Approver	Last Modified Date/Time	Supplier ID
32701	0000008925	Hulks LLC	8962	stepa0630001	stephen.green@tn.gov	7/16/2020 9:00	jayce0226001	Approved	7/16/2020 11:22	0000243850
32701	0000008925	Hulks LLC	8962	stepa0630001	stephen.green@tn.gov	7/16/2020 9:00	benja1008001	Approved	7/16/2020 11:30	0000243850
32701	0000008930	Johnson Inc	6201	stepa0630001	stephen.green@tn.gov	7/16/2020 14:47	bobbc0401001	Approved	7/17/2020 7:37	
32701	0000008930	Johnson Inc	6201	stepa0630001	stephen.green@tn.gov	7/16/2020 14:47	benja1008001	Denied	7/17/2020 7:42	
32701	0000008931	Williams Way LLC	4321	stepa0630001	stephen.green@tn.gov	7/16/2020 14:52	bobbc0401001	Approved	7/17/2020 7:43	0000243852
32701	0000008931	Williams Way LLC	4321	stepa0630001	stephen.green@tn.gov	7/16/2020 14:52	benja1008001	Approved	7/17/2020 7:43	0000243852

Query notes: Jayce0226001 and bobbc0401001 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

Registration ID From :

Registration ID To :

**Results:**

BU	Registration ID	Supplier Name	Last four digits of TIN	Registration Submitted By	Email Address of Submitter	Date/Time Agency Submitted Reg	Approver	Action taken by Approver	Last Modified Date/Time	Supplier ID
32701	0000008930	Johnson Inc	6201	stepa0630001	stephen.green@tn.gov	7/16/2020 14:47	bobbc0401001	Approved	7/17/2020 7:37	
32701	0000008930	Johnson Inc	6201	stepa0630001	stephen.green@tn.gov	7/16/2020 14:47	benja1008001	Denied	7/17/2020 7:42	

Query notes: Bobbc0401001 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.