Setting Up a Vendor Profile - Undergraduate Student Life

Section I: Paperwork Collection and Vendor Questionnaire

1. After a vendor setup request is submitted on your behalf, you will receive an email from Vendor Management that looks like the below: (Please be sure to check your spam folder)

![Email from Vendor Management](image)

**IMPORTANT:** Your password will expire after 2 weeks of inaction. If you do not complete this request in that time, this will result in starting the process over and a possible delay in your first payment. Additionally, your initial password is only good for **one entry** into this form. If you log in to the form and do not complete it and submit at the end, you will need to request a new temporary password with Administration & Planning.

2. Please follow the link embedded in this email and use your username and password provided in the email from Vendor Management, which will take you to the following screen to log into the vendor/payee request form.

![Vendor Request Form](image)
3. Please fill out all required fields on the ‘Header Info’ and ‘Address Info’ sections of the form. Required fields are denoted with a red asterisk (*). The address in your vendor profile should match the address exactly as it appears on your W-9 or W-8BEN. If it does not, this will result in a hold on your vendor account and potential delays in payment.

4. Please fill out the required fields (*) on the ‘Vendor Categorizations’ section of the form. See below for sample responses:

![Vendor Categorizations Table]

5. Please fill out the ‘ACH/Wire Instructional Info’ section of the form. List the contact information of the person authorized to set up new accounts in this section so we can confirm banking information.

![ACH/Wire Instructional Info Table]
6. Once all required fields are completed, please submit the form. You will receive the below confirmation that the form was submitted successfully:

![Vendor Request ACH info Confirmation Page]

This concludes the first section of your vendor profile creation. If you would like to receive a check as payment for your work, you have completed all necessary items at this time. Vendor management may reach out to confirm that you would like a check. Please skip ahead to Section III for final remarks. If you would like to sign up for direct deposit (ACH), please see the next section.

**Section II: ACH/Direct Deposit Sign-up**

Please have the bank account number and routing number ready for this section.

1. Within 5-10 minutes of submitting the vendor questionnaire, you should receive another email from vendor management entitled ‘Columbia University Pending ACH info.’ This email will include a link for you to sign up for direct deposit. Please note that this password is different than your first login attempt.

![Columbia University Pending ACH info email]

Dear Student Name,

The Columbia University Vendor Management Department has received a request and you were indicated as the authorized individual to add ACH information to the pending form. In order to complete this request, we need to collect additional information.

Please log into the request form at [https://forms.finance.columbia.edu/vendor-request/vendorlogin](https://forms.finance.columbia.edu/vendor-request/vendorlogin) using the username and temporary password, listed below. Please note that the temporary password will only last 120 hours. Please do not share this link as it is intended for your company. If time has expired, please contact us at [http://finance.columbia.edu/center/finance-service-center](http://finance.columbia.edu/center/finance-service-center).

Please do not reply to this email. Contact the Service Center with any questions or concerns regarding this request.

Request ID: 138272-262483
Username: 138272-262483
Temporary Password: p44cFKNs3r
IMPORTANT: If you do not enter banking information within 5 days of receiving this email, you will be automatically enrolled to receive checks to the address listed in your vendor profile. If you would like to enroll in direct deposit at later date, contact USL Administration & Planning to assist.

2. Follow the link in your email and enter your username and new temporary password. If you do not see a password field, you will need to log out of the finance gateway as shown below:

![Finance Gateway ARC Vendor/Payee Request Web Form](image)

3. Return to your email and click the embedded link again. This time, you should be prompted to sign in with your credentials.

![ARC Vendor/Payee Request Login](image)

4. Enter all bank account information.
5. Ensure all banking information is correct by clicking ‘preview’ and submit banking information once done.  

**IMPORTANT**: A representative from Vendor Management will call you to verify your banking information over the phone. This step is part of the process and should not be ignored.

**Section III: Approvals and Communication from Vendor Management**

After you submit your vendor questionnaire (Section I) and banking information (optional Section II), your request will be routed to a vendor analyst for review. They will email you if there are any remaining action items, questions or holds. Please respond to the analyst in a timely fashion. Common reasons for holds include:

- Different address on W-9/W-8BEN than on vendor questionnaire
- Unsigned W-9/W-8BEN tax form
- International vendor - Need to submit additional information

Vendor analysts can take anywhere from 3-5 business days to remove holds after your response. Once your vendor profile is reviewed and approved by the analyst, you will receive the below confirmation email. Your vendor ID is listed in this email - please keep this number for future payments and inquiries. You have now completed all necessary steps to receive your payment.