



EPIC

Electronic Procurement and Invoicing Center

Maintaining the EPIC Vendor Database

There are certain protocols that have to be followed in order to approve a vendor in EPIC. Below we have highlighted important steps and information that must be completed to make the requested additions and changes. Due to the laws on Data Privacy and Security that were implemented July 1, 2006, no W9's or W8BEN's should be sent through e-mail. They must be faxed or mailed.

Adding New Vendors or Changing a Vendor's Name

- Send (or request that Purchasing send) a Vendor Information Packet (VIP) which contains the "Request for Taxpayer Information, Identification and Certification" form, the W9 or W8BEN (for foreign vendor), and an ACH agreement which is an option for vendor payment. This document may be requested from Purchasing at purchasing@indiana.edu or on EPIC's On-eStart channel under the [Documentation](#) tab. Upon receiving the documentation from the vendor, ensure that the following information/documentation is included and entered into EPIC before you send the forms/EPIC document to the Vendor Workgroup for approval. (If this information is not included on the forms, then new forms must be requested.)
- The Request for Taxpayer Information, Identification and Certification Information page and the W9. The ACH agreement is op-

tional.

- The W9 must have:
 - Vendors Legal Name
 - Address
 - Correct TIN
 - Ownership Type
 - Signature (Penalty of Perjury – Signing makes the vendor liable that the information is correct.) If this information is missing, we must request a new W9.
- **Individuals:** When the vendor is an individual, place a note on the vendor note screen as to what the individual will be doing for the University.
- **Foreign Vendors:** If a foreign vendor refuses to complete/sign the W8BEN form, we can substitute this form with the Foreign Individual/Entity Certificate Form or the W8Exp.
- **Doing Business As (dba):** If the W9 lists a dba or trade name, type it immediately after the vendor's legal name, for example: Joe Smith dba Joe's Fish Barn. If dba is too long, it may be typed on the first line of the address and the address on the second line.
Example Address:
Line 1: dba Joe's Fish Barn
Line 2: 123 B Street
- **Divisions:** If you enter a division, add a vendor note as to why it is a division.
- **Remit to Address:** If you add a remit to address, add a vendor

All requests to modify a vendor in EPIC require a note on the Vendor Note Screen.



Maintaining the EPIC Vendor Database (cont...)

note explaining why you are adding this address, and who requested it be added.

Vendor Modifications:

- If you modify a vendor, detailed notes as to why you are updating and what documentation you have to support it must be added to the vendor note screen.
- If you modify the vendor's legal name, the tax number, and/or ownership type, a new W9 form is required.
- If you inactivate a vendor, add a note to the vendor notes as to why you are inactivating the vendor.
- If there is a change to the vendor address, a note needs to be added to the vendor note screen as to why the change is being made and who requested it. ■

Apple B2B Online Store Demo and Latest Apple software release:

You are invited to the introduction of IU's new B2B Online Apple Store and an introduction of the latest Apple software with an in-depth afternoon session.

Nathan Smith (IUPUI), and Marc Kerr from IU. Presentations from Apple will include Dick Hamstra, Jason Bruder, Randy Wright and Randy Ferber.

Apple Demo

IUB: Nov. 6

IUPUI: Nov. 7

Hosted by:

Apple, IU and IUPUI Purchasing and UITS

Join us for a session that will be of interest to both IT support providers and departmental purchasing representatives.

- Learn how to purchase Apple products more easily through the IU Purchasing System. Quicker ordering means quicker delivery!
- Learn about options for servicing and supporting Apple products at IU.
- Afternoon sessions--get an in-depth look at the latest Apple software

Dates and Locations:

Bloomington--Tuesday, November 6 in the Indiana Memorial Union, Georgian Room

Indianapolis--Wednesday, November 7 in the Undergraduate Library UL1126

Morning: 9:00-11:00--How to Buy, Support and Service Apple Products at IU

Afternoon: 1:00-3:00--What's new with Apple? In depth look at the latest Apple software

Audience: Departmental purchasers and LSP's

Please RSVP to: hamstra@appzle.com ■

Presenters include Jill Schunk (IUB),



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PGC Scientifics has been a participating Science Catalog Supplier. PGC Scientifics is available through Continental Laboratory Products, who is now a participating Science Catalog supplier. PGC Scientifics has been removed as an individual catalog from the Science Catalog.

If you have any questions related to the availability of PGC Scientifics for your specific organization, we would encourage you to contact Continental Laboratory Products:

Kürstin Evenstad
Continental Lab Products/PGC
Sales Administrator
858-279-5000 ext 130
kevenstad@clpdirect.com ■

Green Office Supplies Initiative (IUB, IUK, IUSE, IUE)

Concerto in partnership with Indiana University Purchasing are working together to achieve a “greener” more environmentally friendly campus, by identifying recycled office supply product alternatives. Beginning 10/1/07, select items in the EPIC Shop Contracts Concerto link will be automatically replaced with alternative “green” products. Purchasing has worked with Concerto to assure that the pricing of the “green” substituted items either matches or is lower than the pricing of the original items. This only applies to the following campuses: IUB, IUK, IUSE, and IUE.

product choices by shopping the RE-CYCLED catalog dropdown on the left side of the ORDER BY PRODUCT page. Here you can explore the selection of recycled items in the Concerto catalog. Additionally, the Indiana University best buy 8.5 X 11 100% recycled copy paper is product code P1054922 and the best buy 8.5 X 11 30% recycled copy paper is product code P10M55957.

If you have any questions, please contact Concerto/OfficeMax account manager Dave Burket at dave-burket@officemax.com or (317) 823-3300 x3532. Or, feel free to contact your campus Purchasing Department. ■

You can also do your part to make environmentally friendly office supply

Your Campus EPIC Contacts:

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Subscribe to the EPIC Listserv

To receive updated information and announcements about EPIC, you can subscribe to the listserv by:

- Sending an e-mail to : listserv@indiana.edu
- Place “subscribe EPIC-L” in the body of the message (no subject).