

Subject: Vendor and Payee Setup/Update Requests

Are you ready to process an order or submit a Request to Pay form and unable to locate a vendor/payee in the system? Need an address updated and don't know who to notify? If the answer is yes to either question, there is a new and improved procedure to help facilitate the setup and update process.

As the requesting department, you can enter the required information yourself or simply direct the Vendor or Payee to complete the respective form. Once setup has been completed, you will be notified by email so the requisition and or form can be submitted and approved.

Benefits:

- Vendors and Payees can now submit information directly; to include W-9, Social Security Number (SSN) and Date of Birth (DOB) submission.
- Setup/update requests are removed from the Requisition and Payment Request process. This will improve turnaround times and improve Requisition to PO cycle-times.

Detailed Process:

1. Form Submission by Requester, Vendor or Payee – if the Vendor or Payee submits the form, be sure to provide them your email and department (*required for submission*)
 - [Vendor Setup Form](#) (*External Vendors*)
 - [CSU Payee Setup Form](#) (*Student, Faculty or Staff only*)
 - Form links can be found on the [Purchasing](#) home page or within the MagnusMart Organizational Message section
2. Purchasing will perform submission verification and complete setup in PeopleSoft
3. Vendor/payee information will be transmitted from PeopleSoft to MagnusMart
4. Requester will be notified setup has been completed
5. Requester submits requisition or request to pay form

