

Westfield State University
Procurement / Accounts Payable
Vendors – W-9 Form FAQs – January 2025

Why is it important to have a Form W-9?

In order to be in compliance with state and federal guidelines, the university must have a valid Form W-9 on file for all vendors. Furthermore, at calendar year end the Financial Accounting department must send a Form 1099 to all applicable vendors. In order to identify which vendors are required to receive this form, Financial Accounting must rely on the vendor's Form W-9 information which was entered into Banner. Any discrepancies can be verified with the actual W-9 form.

What process does a Form W-9 undergo before a vendor is current and valid?

Upon obtaining a Form W-9, a verification process must take place online through the Internal Revenue Service, OFAC, and the MA Inspector General at a minimum. Once vetted, it is entered into Banner for use. This procedure applies to:

- New vendors
- Existing vendors with any pertinent information change, e.g. Legal Address, Remit Address, Tax ID#, Name, etc.

Who is a vendor?

A vendor is any person, company, organization, or other valid entity to whom the University will be issuing payment for purchased goods received or services rendered.

What is considered a valid signature on a Form W-9?

Adobe Sign, DocuSign or wet signature forms can be submitted. Originals are not required however any scanned W-9's sent via email MUST be encrypted if they contain a social security number.

Where can a vendor obtain a Form W-9 to submit?

Our preferred W-9 can be emailed to vendors (https://westfield.ma.edu/documents/Vendor_W9_Form_WSU.pdf). This form allows for a Vendor's legal and remit addresses. Alternatively vendors can go online to <https://www.irs.gov/pub/irs-pdf/fw9.pdf>.

Without this vendor process in place and updated when applicable, payments to vendors are delayed until such time the information becomes updated.