

New Supplier Setup Checklist

Use this checklist to help ensure all proper onboarding documentation is received by the Medical University of South Carolina (MUSC).

Important Reminders

- Please review MUSC's Purchase Order Terms and Conditions before registering in the portal. Review the [terms and conditions](#).
- Contact the University Procurement Office at 843-792-4521 or email marketplace@musc.edu for clarification or questions.

SUPPLIER REGISTRATION THROUGH THE PORTAL

1. Items with checkboxes are action items. Please ensure each box is addressed.
2. All areas with an *asterisk must be completed to move onto the next step.
3. Documents requiring signatures are either physically signed or digitally signed with a unique identifying code or certification ribbon. See examples:



4. Necessary attachments are uploaded into the appropriate section.
5. Information on the forms submitted should be uniform for audit purposes and to ensure proper payments.

PAYMENT INFORMATION SECTION

1. Electronic (ACH) payment is the default payment method at MUSC. Electronic payments enable our suppliers to receive their payments faster than checks. Other forms of payment, including check, wire transfer (international vendors only), and credit card payments, with exceptions (See Item 3), are honored. Multiple selections may be made. Check will become the temporary default payment method if any payment information is missing or incomplete, or if credit card payment is the only method listed.
2. Direct Deposit Authorization Form and International Wire Transfer Forms (optional):
 - Writing is typed or legible and clearly written;

- All sections are filled out completely;
- Signed where appropriate; and
- Required if this is the only form of payment accepted.

3. **Credit card payments are made through the departments and not Accounts Payable.** There are certain transactions allowed under MUSC policy where the credit card may be used.

TAX INFORMATION SECTION

Important notes:

- Ensure that the information provided is in accordance to how the company/organization is setup with the IRS. The IRS assesses fines and penalties for mismatched names/taxpayer ID numbers.
- Common issues:
 - Failure to select the tax classification for the LLC in the blank space on line 2 of section 3. The space should be S, P, C.
 - "Other (see instructions)" in section 3 is blank. There should be valued in that space.

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) ► _____

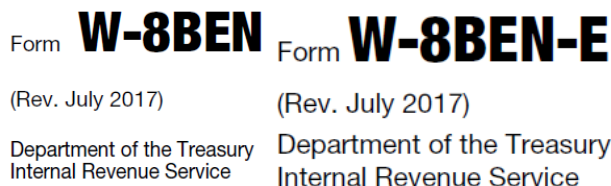
Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is **not** disregarded from the owner for U.S. federal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

Other (see instructions) ►

- For domestic vendors, only the October 2018 version of the W9 will be accepted. This information can be found in the top left-hand corner of the form.



- For international vendors, only the July 2017 version of the W-8BEN-E or W-8BEN will be accepted.*



*Additionally, reviewed by MUSC's tax office to determine proper tax/withholding.

All sections completed and signed as stated above.

ADDRESSES AND CONTACTS SECTION (NEW VENDOR ORDER INFORMATION FORM)

- Legal name must match legal name on W-9 line 1 (name as shown on tax return).
- DBA name must match DBA name on W-9 line 2 (if applicable).
 - Names must match the invoice.
- Order Information section: This is the physical address where orders are placed, or goods/services are coming from.
- Payment Information section: This is the address where remittance payments go to.
 - This section may match the order information section. The Order Information section must be filled out.
- How Do You Want To Receive Purchase Order section: Select the way your company/organization would like to receive purchase order (Order Information section).

Additional questions? Please contact us via email at marketplace@musc.edu or 843-792-4521.