

## Update Business or Legal Name Associated with a Vendor Account

To successfully transact in the Statewide Financial System (SFS), it is important to **first** refer to the related SFS Handbook. Job aids should be referred to as quick reminders on how to process transactions. SFS Handbooks provide more context and include screenshots.

<b>Job Aid Number</b>	<b>JAA-VEN101-038</b>
<b>Purpose</b>	This quick guide provides the steps necessary to update the name on an SFS vendor account, without changing the tax id associated.
<b>User Role</b>	<b>SFS VENDOR DELEGATED ADMIN</b>
<b>Date Modified</b>	<b>11/29/2023</b>
<b>Related SFS Handbook</b>	SFS Training for Vendors

Update the business or legal name associated with a SFS vendor account


### Concept

The name legal on a vendor account can be updated as long as the information is consistent with the associated IRS tax information.


<b>Predecessor(s)</b>
Transactions that should occur before this task.
<i>Note: this process requires that you upload a filled-out and signed W-9 form.</i>
<i>If you already have an IRS Form W-9 filled out and ready to upload, that should work.</i>
<i>Otherwise, you may acquire the New York State Substitute Form W-9 here:</i>
<a href="https://www.osc.state.ny.us/files/vendors/2017-11/vendor-form-ac3237s-fe.pdf">https://www.osc.state.ny.us/files/vendors/2017-11/vendor-form-ac3237s-fe.pdf</a>

<b>Successor(s)</b>
Transactions that should occur after this task.
N/A



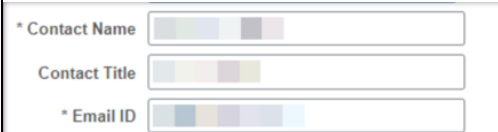

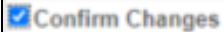

### Procedure

Step	Action
1.	<p>From <b>My Homepage</b>, click the <b>Supplier Change Request</b> tile.</p>  <p><b>Alternative Navigation:</b> NavBar &gt; Menu &gt; Maintain Supplier Information &gt; Supplier Change Request &gt; Initiate Supplier Change.</p>

Update Business or Legal Name Associated with a Vendor Account

	<p style="text-align: center;"><b>Supplier Change Request</b></p> 
2.	<p>Click the <b>Create New Request</b> button.</p> 
3.	<p>This will bring you to the <b>Welcome Page</b>. (Note, it can sometime take up to 20 seconds for the <b>Welcome Page</b> to load).</p> <p>On the <b>Welcome Page</b>, click the <b>Company Profile</b> icon located toward the top of the page.</p> 
4.	<p>Enter your organization's new name in the <b>Supplier Name</b> box.</p> 
5.	<p><b>Note:</b></p> <ul style="list-style-type: none"> <li>• Name changes require a W-9 to be attached. Failure to provide required documentation will result in the denial of your request.</li> </ul>
6.	<p>Click on the <b>Add/View Attachment</b> button in the <b>Profile Questions</b> section on the <b>Company Profile</b> page.</p> 
7.	<p>The <b>Profile Response Attachment Box</b> will popup. Click on the <b>Upload</b> button in the Upload column.</p> 
8.	<p>The <b>File Attachment Box</b> will popup. Click on the <b>Choose File</b> button, find your file on your drive, select it so it appears in the box then select <b>Upload</b>.</p> 
9.	<p>Click on the <b>OK</b> button</p>
10.	<p><b>Optional:</b> If the vendor record is for an individual or sole proprietorship, it is likely that the <b>Contact Section</b> of the Supplier Change Request also needs updating. Please continue to next step 11 if you need to update the <b>Contact</b>.</p>

Update Business or Legal Name Associated with a Vendor Account

	<p>If you DO NOT need to update the CONTACT at your organization, please skip steps 11-13 and continue to step 14 to submit this Supplier Change Request.</p>
11.	<p>Click on the <b>Contacts</b> icon towards the top of the <b>Company Profile</b> page</p> 
12.	<p>Select the <b>Edit</b> pencil to the right of the Primary <b>Contact Type</b></p> 
13.	<p>Enter the updated Primary Contact information</p> 
14.	<p>Click on the <b>Submit</b> icon</p> 
15.	<p>On the <b>Review and Submit Changes</b> page, note that all requests to change Business Name and Primary Contact must be authorized.</p> <p>Take a moment to review your changes for accuracy before submitting your request.</p> <p>Use the "<b>Review</b>" button to review changed information. Then...</p>
16.	<p>Check the <b>Confirm Changes</b> Box</p> 
17.	<p>Click on the <b>Submit</b> button to submit your change request</p> 
18.	<p>This will submit the Supplier Change Request.</p> <p>Immediately afterwards you will receive an auto-e-mail alerting you to its submission.</p> <p><u>The change is not yet in effect.</u></p>

Update Business or Legal Name Associated with a Vendor Account

	<p>Once the Vendor Management Unit receives your confirmation in workflow and approves your Supplier Change Request, another auto-e-mail will arrive; notifying you of the Change Request approval, meaning the change is in effect.</p>
	<p><b>End of Procedure.</b></p>