

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.

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

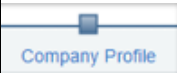
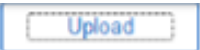
Predecessor(s)
Transactions that should occur before this task.
<i>Note: this process requires that you upload a filled-out and signed W-9 form.</i>
<i>If you already have an IRS Form W-9 filled out and ready to upload, that should work.</i>
<i>Otherwise, you may acquire the New York State Substitute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

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

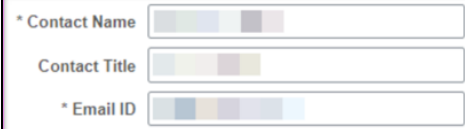
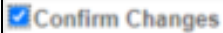
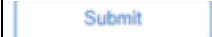
Procedure

Step	Action
1.	From My Homepage, click the Supplier Change Request tile.  Alternative Navigation: NavBar > Menu > Maintain Supplier Information > Supplier Change Request > Initiate Supplier Change.

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	Supplier Change Request 
2.	Click the Create New Request button. 
3.	This will bring you to the Welcome Page. (Note, it can sometime take up to 20 seconds for the Welcome Page to load). On the Welcome Page, click the Company Profile icon located toward the top of the page. 
4.	Enter your organization's new name in the Supplier Name box. 
5.	Note: Name changes require a W-9 to be attached. Failure to provide required documentation will result in the denial of your request.
6.	Click on the Add/View Attachment button in the Profile Questions section on the Company Profile page. 
7.	The Profile Response Attachment Box will popup. Click on the Upload button in the Upload column. 
8.	The File Attachment Box will popup. Click on the Choose File button, find your file on your drive, select it so it appears in the box then select Upload. 
9.	Click on the OK button
10.	Optional: If the vendor record is for an individual or sole proprietorship, it is likely that the Contact Section of the Supplier Change Request also needs updating. Please continue to next step 11 if you need to update the Contact.

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

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	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.
	End of Procedure.