

BURKBURNETT ISD

PROCEDURES: ADDING AND/OR RENEWING VENDOR

Goal: To ensure a systematic process of adding and renewing vendors on the finance database. The process is designed to meet local, state, and federal guidelines related to vendor relations and procurement by a school district.

Vendor Application

- ❑ The requestor shall forward the Vendor Application Packet (if applicable) to the prospective vendor. An inactive vendor must complete a new Vendor Application Packet after a 1-year period of inactivity.
- ❑ The Vendor Application Packet shall include the following:
 - Vendor Application
 - Form W-9
 - Conflict of Interest Questionnaire
 - Felony Conviction Form
 - Criminal History Verification (if applicable)
 - Certificate of Insurance (with Burkburnett ISD as additional insured, if applicable)
- ❑ The requestor will submit an “Adding New Vendor” through Skyward and if applicable submit the completed Vendor Application Packet to the Accounts Payable Manager.

Vendor Review and Approval

- ❑ The Accounting/Purchasing Specialist shall review the request to “Add New Vendor” and/or the packet to ensure that all required items have been submitted and are properly executed.
- ❑ If the vendor will perform services on Burkburnett ISD Property, the vendor must provide the Certificate of Insurance (with Burkburnett ISD as additional insured) prior to the start of any work and only after a purchase order has been approved by the final approving authority.
- ❑ After the Accounts Payable Manager has verified that an “Add New Vendor” and/or Vendor Application Packet is complete, the vendor will be added to Skyward, certain vendors will also be approved by the Director of Finance.

Vendor Database Management

- ❑ The Accounts Payable Manager or Clerk shall create a complete vendor record, including but not limited to the following:
 - ❑ Vendor legal name and DBA, if applicable
 - ❑ Mailing address
 - ❑ Remit address, if applicable
 - ❑ Tax Identification Number or Social Security Number
 - ❑ Date W-9, Felony Conviction, and CIQ forms were received from vendor
 - ❑ Company phone numbers: voice and fax
 - ❑ Company email

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- ❑ Prior to adding a new vendor, the Accounts Payable Manager shall verify if the vendor does not exist in the Vendor Database in an active or inactive status.
 - If the vendor does exist, and the vendor identification information is the identical, the inactive vendor may be reactivated.
- ❑ The Accounts Payable Manager or Clerk shall make changes to the vendor database upon receipt from a vendor of a change in address, phone number, email, etc.

Vendor Tracking

- ❑ **The District shall use the auto-naming (name-keys) feature in the finance system. At no time, shall a vendor name-key be reused as this will create data quality issues for historical finance files.**