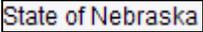
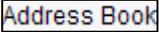


Address Book Request - Add

Step	Action
1.	End Users MUST have an Address Book Role that allows submission of requests for new records or to make changes to existing records. The Address Book Role AB09 does not have the ability to submit Address Book Requests. All other Address Book Roles allow the End User to submit Address Book Requests.
2.	Click the State of Nebraska link. 
3.	Click the Address Book link. 
4.	Click the Enter Address Book Requests link. 
5.	Read through the " General Instructions: Adds: " for Documentation Requirements: .
6.	Click the Add button. 
7.	NOTIFICATION OF ADDRESS BOOK RECORD UPDATE <ul style="list-style-type: none"> o Name o Agency o Phone o Email Address - confirmation of Address Book record creation or update will be e-mailed to this address <p>Notification Information is required and defaults to the Requester Information, but can be overridden if desired.</p>
8.	REQUESTER INFORMATION <ul style="list-style-type: none"> o Name o Agency o Phone o Email Address <p>Requester information is required. This information is used for communication between the Requester and the individual updating/creating the Address Book Record. Information populates based on the Requester's User ID and Address Book information.</p> <p>Only the contact phone and e-mail address can be overridden, if incorrect.</p>
9.	Click the Search Type tab. 

Step	Action
10.	<p>SEARCH TYPE tab</p> <p>Search Type must be selected prior to entering Address Information.</p> <p>Selection of Search Type determines the fields which are required for data entry.</p>
11.	<p>ADDRESS BOOK SEARCH TYPE SELECTION</p> <p>The Address Book Request application is used to request new Address Book records:</p> <p>Vendor (V) – Procurement, PO’s, Contracts and Payments to Businesses, Entities, Vendors, Suppliers, and Individuals</p> <p>Facility (F) – State Agency locations for Print Shop deliveries and mailing addresses, and IBT Processing</p> <p>Customer (C) – Receivables Invoice Processing (outside of State Government) and Print Shop deliveries</p> <p>Political Subdivision (VP) – Political Subdivision (city, county, etc.) that will receive payments from the State</p> <p>Blind and Visually Impaired Client (BV) – Used only by the Commission for the Blind and Visually Impaired</p> <p>Non-Employee (N) – Used only by Authorized Agents for System User Access</p>
12.	<p>Click on the appropriate Search Type radio button and, if applicable, check box(es) within search type selection.</p> <p>Click the Search Type radio button.</p> 

Step	Action
13.	<p>An Agency code is required for certain Search Types. If required, the Agency field will appear in "RED" on the Search Type tab.</p> <p>Search Types requiring an Agency code:</p> <ul style="list-style-type: none"> o Vendor (V) - SSN for Board or Commission Member, enter the Agency requesting the Address Book record o Facility (F) - Enter the Agency that will be used in the Mailing Name field o Customer (C) - Enter the Agency requesting the Address Book record o Blind and Visually Impaired Client (BV) - Defaults to "081" o Non-Employee (N) - Enter the Agency requesting the Address Book record <p>Use Visual Assist if Agency code is unknown.</p> <p><i>Note:</i> Administrative Services Divisions must select the appropriate Division code.</p> <ul style="list-style-type: none"> o A05 = AS - Materiel Division o A10 = AS - Transportation Services Division
14.	<p>Click the Address Information tab.</p> <p>Address Information</p>
15.	<p>ADDRESS INFORMATION tab</p> <p>Information specific to the new Address Book record must be entered in the appropriate format.</p> <p><i>Note:</i> Fields marked with an asterisk (*) are required for submission.</p> <p><i>Note:</i> For Search Type V and VP records, the DBA Name should be listed in the Alpha Name and Address Line 1/DBA fields.</p>

Step	Action
16.	<p>Alpha Name</p> <p>With the exception of the comma separating last and first name, punctuation is not allowed. Punctuation such as a period or hyphen should be replaced with a space.</p> <ul style="list-style-type: none"> o John O'Brien = OBRIEN, JOHN o HFI, Inc. = HFI INC o Connie Jones-Smith = JONES SMITH, CONNIE o Ebay.com = EBAY COM <p>Title and Suffix are not included in the Alpha Name.</p> <ul style="list-style-type: none"> o Dr. John Smith = SMITH, JOHN o John L. Smith, MD = SMITH, JOHN L o John Smith Jr. = SMITH, JOHN <p>Do not enter the word, "The" or "A".</p> <ul style="list-style-type: none"> o The Money Company = MONEY COMPANY o A Better Way Service = BETTER WAY SERVICE <p>Unless the record is a DBA (Doing Business As), the Alpha Name should match the owner of the Federal Tax ID or Social Security Number. If this record is a DBA, the operating business name should be entered in the Alpha Name field.</p> <p>Only one individual name is allowed in this field. The person who owns the Social Security Number entered on the request should be entered in the Alpha Name field. Betty and Bob Jones should be entered as a single name depending on the name associated with the SSN:</p> <ul style="list-style-type: none"> o JONES, BETTY or o JONES, BOB <p><i>Note:</i> Both names can be entered in the Mailing Name field.</p> <p>If possible, do not abbreviate.</p> <ul style="list-style-type: none"> o Nebraska State Fair = NEBRASKA STATE FAIR, not NE STATE FAIR. <p>Hotel/Motel locations are to be entered as City State (for locations outside of Nebraska) or City (for locations in Nebraska.</p> <ul style="list-style-type: none"> o HOLIDAY INN – DES MOINES IA o HOLIDAY INN – SCOTTSBLUFF <p>VP records should include specific agency, division, etc.</p> <ul style="list-style-type: none"> o LINCOLN CITY OF – WATER SYSTEM o LANCASTER COUNTY - REGISTER OF DEEDS
17.	<p>W-9 Information Section or General Information Section</p>

Step	Action
18.	<p>Mailing Name</p> <p>Enter the name as it should appear on the warrant or invoicing document. The Mailing Name field is the first line that appears on either a printed warrant or an invoicing document.</p> <p>The only punctuation allowed are hyphens “-“ and ampersands “&”.</p> <ul style="list-style-type: none"> o Dr. John Smith, Jr. = DR JOHN SMITH JR o 4/D Trenching and Excavating, L.L.C. = 4-D TRENCHING & EXCAVATING LLC <p>If this is a DBA, enter the name of the individual who owns the Social Security Number or the name of the parent company who owns the Federal Tax ID entered on this request.</p> <p><i>Note:</i> The Mailing Name is the name as known by the IRS (listed on the W-9 "as shown on your income tax return") and must match IRS records.</p>
19.	<p>Address Verification</p> <p>Verify proper Address Information through www.usps.com > Find a Zip Code.</p> <p>Reference Training Guide - Address Verification - USPS.</p> <p><i>Note:</i> For V and VP records, remember to list any DBA's in the Address Line 1/DBA field and begin entering the address in the Address Line 2 field.</p> <p>To ensure accuracy of data and compliance with USPS standards, copy address information directly from www.usps.com.</p>

Step	Action
20.	<p>Address Lines</p> <p>The only punctuation allowed are hyphens “-“, ampersands “&”, and in care of “C/O”.</p> <ul style="list-style-type: none"> o CITY LIBRARY - AUBURN MEMORIAL LIBRARY o POWER & IRRIGATION o C/O CHARLES DALE - TREASURER <p>Address lines can be an extension of the Mailing Name if the Mailing Name field is not large enough to accommodate the entire name.</p> <p>Only a confirmed mailing address should be entered. (A confirmed mailing address can be found at www.usps.com.)</p> <p>If both a physical address and a PO Box are entered, enter the physical address before entering the PO Box in the Address Line fields. Physical Address = 101 North State Street and Mailing Address = P.O. Box 123</p> <ul style="list-style-type: none"> o Address Line 1: 101 N STATE ST o Address Line 2: PO BOX 123 <p>If a mailing address includes a suite # or an apartment #, the complete address must be entered on one line. Physical Address = 1542 A Street, Apartment # 5</p> <ul style="list-style-type: none"> o Address Line 1: 1542 A ST APT 5 <p>DO NOT enter:</p> <ul style="list-style-type: none"> o Address Line 1: 1542 A ST o Address Line 2: #5 <p>If this is a DBA, enter DBA "operating business name" in Address Line 1/DBA field.</p> <ul style="list-style-type: none"> o Address Line 1: DBA SMITH CONSTRUCTION o Address Line 2: 123 MAIN ST

Step	Action
21.	<p>Address Lines: Common Street Suffix Abbreviations</p> <p>The US Post Office has standardized abbreviations for addresses. To maintain standardization and to reduce mailing costs, it is important to maintain the same abbreviation standards.</p> <p>If the information provided by www.usps.com differs from the following list of abbreviations, use the information provided by USPS "Look Up a Zip Code".</p> <p>Avenue = AVE Center = CTR Circle = CIR Court = CT Expressway = EXPY Freeway = FWY Heights = HTS Lane = LN Plaza = PLZ Road = RD Street = ST</p> <p><i>Note:</i> Additional abbreviations can be found on the United States Postal Service web-site at www.usps.com.</p>
22.	<p>Address Lines: Common Secondary Unit Abbreviations</p> <p>If the information provided by www.usps.com differs from the following list of abbreviations, use the information provided by USPS "Look Up a Zip Code".</p> <p>Apartment = APT Basement = BSMT Building = BLDG Department = DEPT Floor = FL Lobby = LBBY Lot = LOT Office = OFC Room = RM Suite = STE Trailer = TRLR Unit = UNIT</p> <p><i>Note:</i> Additional abbreviations can be found on the United States Postal Service web-site at www.usps.com.</p>

Step	Action
23.	<p>City</p> <p>Do not use punctuation or abbreviation.</p> <ul style="list-style-type: none"> o O'Neill = ONEILL o St. Paul = SAINT PAUL <p>Use appropriate spacing according to www.usps.com.</p> <ul style="list-style-type: none"> o La Vista = LA VISTA o McCook = MCCOOK
24.	<p>State</p> <p>Enter State (or Province) abbreviation or select an option from the visual assist.</p> <p>If you are unable to find a selection for a Foreign "State", enter Lincoln in the City field and NE in the State field. In the Comments field indicate the correct State (or Province), Zip Code, and Country.</p>
25.	<p>Zip Code + Four</p> <p>Enter the applicable ZIP+4 according to www.usps.com.</p> <p><i>Note:</i> The 4-Digit Extension is a requirement. See instructions for finding Zip Code + 4 Digit Extension at www.usps.com.</p> <p>The 4-Digit Extension will be different for every address.</p> <p><i>Note:</i> In the case of foreign addresses, enter the supplied Postal Code instead of the ZIP+4.</p>
26.	<p>TIN and Federal Tax Classification section</p>

Step	Action
27.	<p>Tax Entity Code (P, C, or N)</p> <p>C = Corporate Entity for a Federal Tax ID (FTIN) or Employer Identification Number (EIN)</p> <ul style="list-style-type: none"> o Corporation <ul style="list-style-type: none"> - C Corp - S Corp o Non-Profit Entity o LLC <ul style="list-style-type: none"> - C-Corp - S-Corp <p>N = Non-Corporate Entity – FTIN/EIN</p> <ul style="list-style-type: none"> o Sole Proprietor o Partnership o Trust/Estate o LLC <ul style="list-style-type: none"> - P - Partnership o Political Subdivision o Facility <p>P = Individual - Social Security Number (SSN)</p> <ul style="list-style-type: none"> o Sole Proprietor o Client o Board or Commission Member
28.	<p>FTIN/EIN or SSN</p> <p>Complete this information for the following Search Types:</p> <ul style="list-style-type: none"> o Vendor (V) o Customer (C) o Political Subdivision (VP) o Blind and Visually Impaired Client (BV) <p>FTIN/EIN or SSN is the Federal Tax ID Number (FTIN), also called the Employer Identification Number (EIN), for an entity or a Social Security Number (SSN) for an individual.</p> <p>Do not enter dashes, spaces, or special characters.</p> <ul style="list-style-type: none"> o 506-11-1111 = 506111111 <p>Include leading zeroes.</p> <ul style="list-style-type: none"> o 047-69-6969 = 047696969 <p>For International Vendors, enter the US Taxpayer ID from the W-8 form. Otherwise, enter the word FOREIGN.</p>
29.	Contact Information section

Step	Action
30.	<p>Phone Number & Fax Number</p> <p>Enter Phone Number and Fax Number of Contact. Format: o Area Code o 471-1234 (for number with an extension: 471-1234 X1234)</p> <p>It is extremely important to add the Contact phone number to the Address Book request. This provides a direct contact for any questions regarding the processing of the Address Book record or further communications once the record has been created.</p>
31.	<p>Vendor Contact Email</p> <p>This email is used to provide system users with a contact e-mail address for an individual within an entity.</p>
32.	<p>Supplemental Information section</p>
33.	<p>Country</p> <p>A blank field is acceptable for United States.</p> <p>This field will populate with country based upon the State (or Province) for the United States, Canada, and Mexico.</p>
34.	<p>County Code</p> <p>County in Nebraska where entity or individual is physically located.</p>
35.	<p>Congress Dist</p> <p>Congressional District as defined by the 2010 US Census Bureau (www.census.gov/2010census/popmap).</p>
36.	<p>DUNS Number</p> <p>Provided by organization or Political Subdivision.</p>
37.	<p>Agency Defined</p> <p>This field is used for specific agencies.</p>
38.	<p>Long Address Number</p> <p>Long Address Information use varies based on Search Type.</p> <p>Facility (F) & Customer (C) – may be used to indicate an Agency specified "billing code" Vendor (V) – Last 4-digits of Bank Account number o AG X1234 – All Agencies o AG 13 X1234 – Only Agency 13 (Department of Education) Blind & Visually Impaired Commission Client (BV) – Client Case number</p> <p><i>Note:</i> This field is only required for Search Type BV.</p>

Step	Action
39.	<p>Business Unit</p> <p>Enter only if Agency specific security is needed for the requested Address Book record.</p> <p><i>Note:</i> This field defaults to "81000000" for the BV Search Type</p>
40.	<p>Send Invoice To</p> <p>Available only when requesting a Facility (F) Address Book record.</p> <p>Used to associate an Agency's preferred billing Address Book number for invoicing.</p>
41.	<p>Review Address Information tab to verify all required fields are complete and optional fields are filled as desired.</p>
42.	<p>Click the Bank Account tab.</p> <p></p>
43.	<p>BANK ACCOUNT tab</p> <p>Enter the ACH information as listed on the ACH Enrollment form.</p> <p><i>Note:</i> DO NOT enter Wire Instructions. The State of Nebraska uses the ACH Network and ACH Instructions must be provided for payments to be sent electronically.</p>
44.	<p>ACH Email</p> <p>The ACH Email Address is used by the system to generate notifications specific to Payables. There can only be one ACH Email Address assigned to an Address Book record.</p>
45.	<p>Bank Transit Number</p> <p>Must be 9 numeric digits.</p> <p>Provided as ACH routing number.</p> <p>Do not enter dashes or spaces.</p>
46.	<p>Bank Account Number</p> <p>Do not enter dashes or spaces.</p>
47.	<p>Checking or Savings Account</p> <p>Select the appropriate account type.</p> <p>0 = Checking 1 = Savings</p>
48.	<p>Payment Instrument field and Pre-Note Code field will populate as needed when the ACH information is entered.</p> <p><i>Note:</i> All ACH information is sent through the 10 day pre-note process.</p>

Step	Action
49.	<p>Comments</p> <p>Communicate information specific to this request.</p> <p>This can include information like:</p> <ul style="list-style-type: none"> o Associate an existing Vendor (V) address book record (physical location) to a request for another Vendor (V) record (remit address). o Indicate attachments to the submitted request o Additional information to be communicated to AS State Accounting o Request to change a Search Type to a different Search Type <p><i>Note:</i> Any information that does not fit in the Comments field can be included as a text attachment.</p> <p><i>Note:</i> This information does not remain in the system for future reference.</p>
50.	<p>Attachments</p> <p>Attachments can be included with requests for new Address Book records or changes to existing Address Book records.</p> <p>Types of attachments include:</p> <ul style="list-style-type: none"> o W-9s o ACH documentation o Text Attachments o Any other documents specific to the Address Book request <p><i>Note:</i> The documents attached to the Address Book Request application are to provide information concerning W-9's, ACH information and notes to the AS State Accounting Address Book Team. These attachments are NOT automatically attached to new or existing Address Book records.</p> <p>Using the Attachments button eliminates the need to interagency mail, fax, or e-mail documentation to the AS State Accounting Address Book Team.</p> <p>Documentation can be submitted via:</p> <ul style="list-style-type: none"> o PREFERRED: An attachment to a request using the Address Book Request application o FAX to (402) 471-0887 o E-mail: as.stateaccounting@nebraska.gov; Subject Line: "W-9" o Interagency Mail <p>The request will be sent to AS - State Accounting - Address Book Team for review and processing. Once processed, an automatic email will be sent to the Notification email address with the new address book number.</p>
51.	Review Bank Account Information to verify all required fields are complete.
52.	<p>Click the OK button.</p> 

Step	Action
53.	Click the OK button. 
54.	Decision: In Training Guide, disregard this information. Select the appropriate action: <ul style="list-style-type: none"> • There are no more Address Book Add Requests Go to step 55 on page 13 • Add a "DBA" Vendor with a Tax Identification Number (TIN) Go to step 57 on page 13 • Add a "DBA" Vendor with a Social Security Number (SSN) Go to step 60 on page 13 • Add a "Board or Commission Member" Vendor with a Social Security Number (SSN) Go to step 64 on page 14 • Add a "Non-Employee" for System Use Go to step 67 on page 14 • Add a "Facility" Go to step 70 on page 14
55.	Click the Close button. 
56.	End of Procedure. Remaining steps apply to other paths.
57.	Click the Search Type tab. 
58.	If you want to add a DBA with an FTIN/EIN <ul style="list-style-type: none"> o DBA information will appear in the Address Line 1/DBA field o Tax Entity Code field is either "C" or "N"
59.	Note: Because "DBA" was selected on the " Search Type " tab, "DBA" is automatically added to the beginning of the Address Line 1/DBA field. Go to step 43 on page 11
60.	Click the Search Type tab. 
61.	If you want to add a DBA with an SSN: <ul style="list-style-type: none"> o DBA information will appear in the Address Line 1/DBA field o Tax Entity Code field is "P"
62.	Note: Because "DBA" was selected on the " Search Type " tab, "DBA" is automatically added to the beginning of the Address Line 1/DBA field.
63.	Tax Entity Code Selection of Vendor (V) with a Social Security Number (SSN) automatically sets Tax Entity Code = P. Go to step 43 on page 11

Step	Action
64.	Click the Search Type tab. Search Type
65.	If you want to add a Board or Commission Member: <ul style="list-style-type: none"> o Clientele Payment Terms default to "Due Upon Receipt" o Agency Code is required to identify the Agency for which the individual is a Board or Commission Member
66.	Tax Entity Code Selection of Vendor (V) - SSN for Board or Commission Member automatically sets Tax Entity Code = P. Go to step 43 on page 11
67.	Click the Search Type tab. Search Type
68.	If you want to add a Non-Employee, you are indicating the individual for whom you are requesting the AB record is not employed by the State of Nebraska, but requires access to the system. <ul style="list-style-type: none"> o Agency Code is required to identify the Agency with which the individual will be associated.
69.	Note: Warning Message appears because Social Security Number is not entered. SSN is <u>not</u> required for Non-Employee (N) Address Book record. Go to step 54 on page 13
70.	Click the Search Type tab. Search Type
71.	If you want to add a Facility: <ul style="list-style-type: none"> o You must enter the Agency responsible for maintaining the Facility address book information. Go to step 54 on page 13