

Address Book Change Request

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SYSTEM POLICIES

The tasks in this documentation provide end users with the tools to enter data and collect data in system. It is the responsibility of the agencies to comply with State Statutes, Federal Rules and Regulations, and State policies. For further information concerning State Statutes and policies, please refer to both internal agency resources and the Department of Administrative Services website.

Table of Contents

Address Book Change Request.....	1
Address Book Change Request Overview.....	1
Address Book Change Request Lesson	1

Address Book Change Request

Address Book Change Request Overview

Requests to change existing address book records must be submitted to the Address Book section of AS - State Accounting.

An end user must have an Address Book Role associated with his/her User ID in order to access the Address Book Request/Change application.

The Address Book Request/Change application is used to request to changes existing address book records for the following Search Types:

- F - Facility (State Agency Locations)
- C - Customer (Outside State Government)
- N - Non-Employee (State Board or Committee Member Expense Reimbursements)
- V - Vendor (Procurement Purposes Only)
- VP - Political Subdivision (Receives payments from the State)
- PP - Payment (Payments made, and not included in any of the above criteria)
- BV - Blind and Visually Impaired Clients

It is also used to submit electronic attachments for existing address book records.

W-9 forms are to be submitted in advance of a vendor being added to the Address Book. (Please navigate to www.irs.gov to find a blank W-9 form.) The agency may still enter the vendor Address Book HTML request form, but the request will be placed on temporary hold until the completed W-9 form is sent to State Accounting via email - as.stateaccounting@nebraska.gov, fax - (402) 471-0887, or regular mail. W-9 forms are required for the following:

- New Business
- Change of business name or Tax ID
- Business is operating under an individual's Social Security Number

Payment Terms - Any Federal Tax ID number receives Net 30. (If necessary, Payment Terms can be changed by using the Special Handling field in Voucher Processing.)

Address Book Change Request Lesson

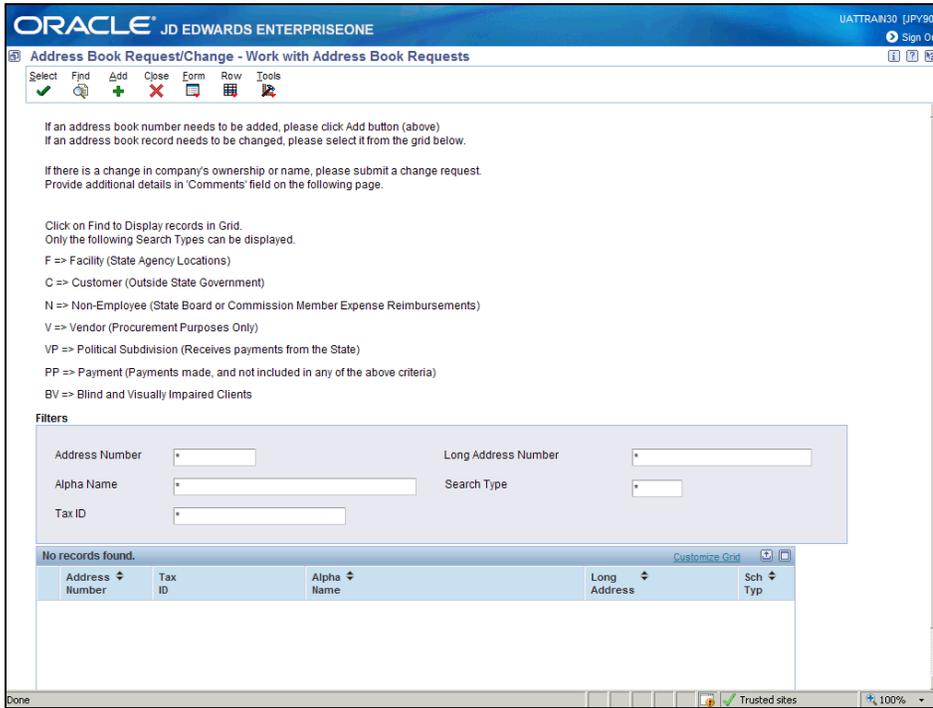
Procedure

Step	Action
1.	End User MUST have an Address Book Role to request new Address Book records or changes to existing records.
2.	Click the State of Nebraska link. <input type="text" value="State of Nebraska"/>

Training Guide

Address Book Change Request

Step	Action
3.	Click the Address Book link.
4.	Click the Address Book Request/Change link.



Step	Action
5.	<p>Filters</p> <p>Search for existing address book record to change.</p> <p>Use as many Filters as necessary to narrow search for a specific Address Book Record.</p> <ul style="list-style-type: none"> o Address Number o Long Address Number o Alpha Name o Search Type o Tax ID
6.	To populate grid based on Filter criteria, click the Find button.
7.	Click the radio button for the Address Book record to be changed.

Step	Action
8.	Click the Select button. 

Step	Action
9.	<p>REQUESTOR INFORMATION</p> <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>Requestor Information is required. This information is used for communication between the Requestor and the individual updating/creating the Address Book Record. Information populates based on the Requestor's User ID and Address Book information.</p> <p>This information can be overridden, if desired.</p>

Training Guide

Address Book Change Request



Step	Action
10.	<p>Comments</p> <p>Communicate information specific about this request.</p> <p>This can include information like:</p> <ul style="list-style-type: none"> o Request to change Search Type to ** o Associate an existing V - Vendor address book record to a request for a PP o Indicate attachments to the submitted request <p><i>Note:</i> Comments field can be updated on all tabs.</p>
11.	<p>To update information specific to the Address Book record, click the Address Information tab.</p> <p>Address Information</p>

The screenshot shows the Oracle JD Edwards EnterpriseOne web interface for the 'Address Book Request/Change - Address Book Add Information' form. The form is titled 'Address Book Request/Change - Address Book Add Information' and includes a 'Sign Out' button in the top right corner. The form is divided into two tabs: 'Requestor Information' and 'Address Information', with the latter being the active tab. A toolbar at the top left contains 'OK', 'Cancel', and 'Tools' buttons. A legend indicates that an asterisk (*) denotes required fields. The form contains several input fields and sections:

- Address Number:** 518458
- Search Type:** PP (PAYEE/PAYABLES)
- Comments:** A large text area for entering comments.
- Attachments:** A button to manage attachments.
- Long Address Number (Internal Use Only):** AG: XX4611
- Alpha Name:** DELL MARKETING - PAYMENTS
- Mailing Name:** DELL MARKETING L.P./DELL TREASURER
- Address Line 1:** ALL ACCOUNTS RECEIVABLE
- Address Line 2:** PO BOX 802816
- Address Line 3:** (Empty)
- Address Line 4:** (Empty)
- City:** CHICAGO
- State:** IL
- Zip + Four:** 60680-2816
- Country:** USA
- Phone Number:** 512 - 725-0686 (Format Example: 402 471-1234 ext #)
- Fax Number:** 512 - 283-9246
- Tax Entity Code (P, C, N):** (Empty)
- Tax ID or SSN:** 742616805
- Vendor Contact Email:** dellterms_arsupport@dell.com
- Business Unit (Internal Use Only):** 1

Additional instructions at the bottom of the form state: '** Do not use dashes, spaces, or special characters. Example: 012345678 (include leading zeroes). For Foreign Vendors, enter the word FOREIGN.'

Step	Action
12.	<p>ADDRESS INFORMATION</p> <p>Information specific to address book records must entered in appropriate format.</p> <p>Real-time Address Book data populates from the ERP system.</p> <p>Overwrite data as necessary.</p> <p><i>NOTE:</i> It is beneficial to communicate information regarding changes in the Comments field.</p>
13.	<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>To ensure accuracy of data and compliance with USPS standards, copy address information directly from USPS look-up into Address Book Request/Change fields.</p>
14.	<p>ATTACHMENTS</p> <p>Attachments can be included with requests for changes to existing Address Book records.</p> <p>Attachments can be W-9s or Text Attachments.</p> <p><i>Note:</i> The documents attached to the Address Book Request/Change are to provide information concerning W-9's to the AS Accounting Address Book Team. These attachments are NOT automatically attached to new or existing Address Book records.</p> <p>This eliminates the requirement to mail, fax, or e-mail W-9 documentation to AS Accounting Division.</p>
15.	<p>W-9 Submissions can be submitted via:</p> <ul style="list-style-type: none"> o Attachments in Address Book Change/Request o FAX to (402) 471-0887 o E-mail to as.stateaccounting@nebraska.gov; Subject Line: "W-9" o Mail
16.	<p>Click the OK button.</p> 
17.	<p>Click the OK button.</p> 
18.	<p>Click the Close button.</p> 

Training Guide

Address Book Change Request



Step	Action
19.	End of Procedure.