

Address Book Add 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.

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Address Book Add Request

Address Book Add Request Overview

In order for a business or individual to receive payment from the State, an Address Book record must exist in the State's ERP system.

To have an Address Book Record added or changed, a request 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 new address book records:

- 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

W-9 forms are to be submitted in advance of a vendor being added to the Address Book. (Please navigate to http://www.das.state.ne.us/accounting/forms/w-9_07alt.pdf to find a blank Substitute 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 Substitute W-9 form is sent to State Accounting via email - as.stateaccounting@nebraska.gov, fax - (402) 471-0887, or regular mail. Substitute W-9 forms are required for the following:

- New Business
- Change of business name or Tax ID - send request through as a CHANGE rather than submitting as an ADD
- 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 Add Request Lesson

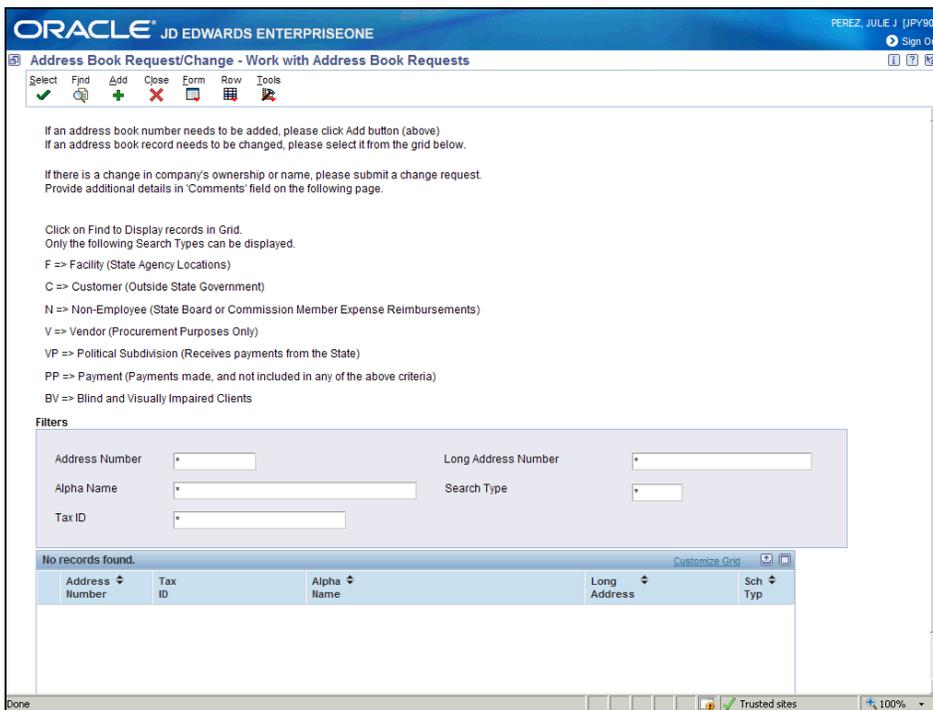
Procedure

In this lesson you will learn how to perform the Address Book Add Request.

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



Step	Action
5.	Click the Add button.

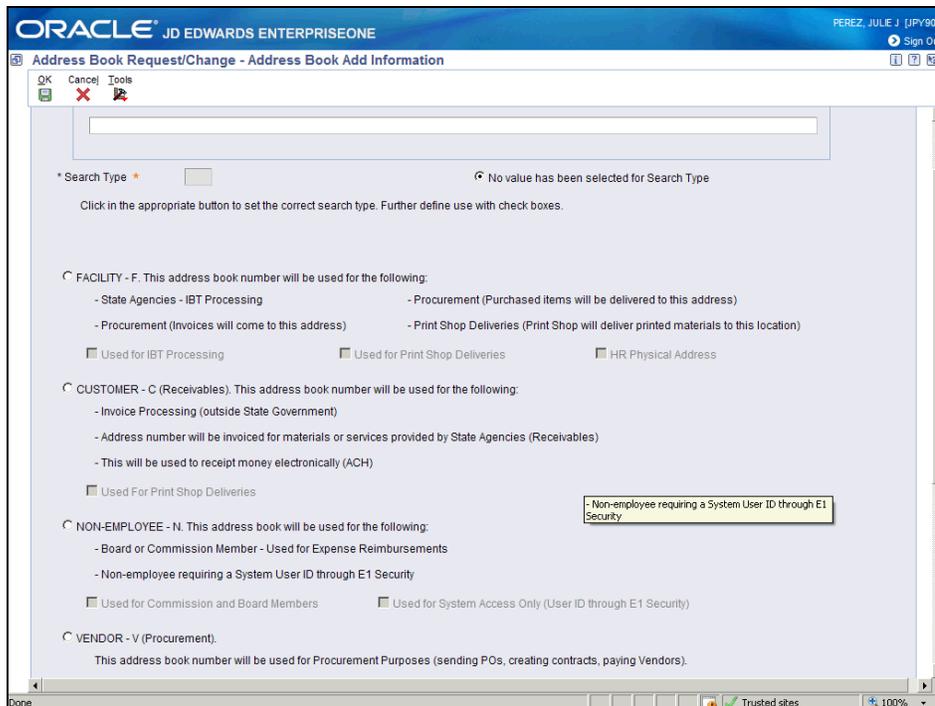
Step	Action
6.	<p>REQUESTOR INFORMATION</p> <ul style="list-style-type: none"> o Name o Agency o Phone o Email Address - confirmation of address book record creation or update will be e-mailed to this address <p>Requestor Information is required. This information is used for communication between the 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>

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Step	Action
7.	<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 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 o Additional information to be communicated to AS State Accounting <p>Note: Comments field can be updated on all tabs.</p> <p>Note: For Supreme Court please enter "Sup in CAT Code 13" in the Comments field.</p>
8.	<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>
9.	<p>Click the Search Type tab.</p> <p><u>Search Type</u></p>



Step	Action
10.	<p>ADDRESS BOOK SEARCH TYPE SELECTION</p> <p>Address Book Records and associated tables are created based on the Address Book Search Type selected.</p> <p>F - Facility (State Agency Locations)</p> <ul style="list-style-type: none"> o Used for IBT Processing o Used for Print Shop Deliveries o Used for HR Physical Address <p>C - Customer (Outside State Government)</p> <ul style="list-style-type: none"> o Use to set up receivables/billing o Used for Print Shop Deliveries <p>N - Non-Employee (State Board or Commission Member Expense Reimbursements)</p> <ul style="list-style-type: none"> o Used for Commission or Board Member expense payments o Used for System Access Only (end user is not a State employee, but requires a User ID for ERP System) <p>V - Vendor (Procurement Purposes and payments)</p> <p>VP - Political Subdivision (Payments)</p> <p>PP - Payment (Payments made, and not included in any of the above criteria)</p> <p>BV - Blind and Visually Impaired Clients (for use by Commission for Blind and Visually Impaired)</p>
11.	<p>Click on the appropriate Search Type radio button and, if applicable check box within search type selection.</p> <p><input type="radio"/></p>
12.	<p>If an Agency Code is required for certain Search Types, Agency field will appear in "RED" on Search Type tab.</p> <p>Search Types requiring Agency Code:</p> <ul style="list-style-type: none"> o Facility - F - Enter the Agency that will be used in the Mailing Name o Customer - C - Enter the Agency Requesting the Address Book record o Non-Employee - N - Enter the Agency Requesting the Address Book record o Blind & Visually Impaired Client - BV - Defaults to "081" <p>Use Visual Assist if Agency Code is unknown.</p> <p>Note: Administrative Services Divisions must select the appropriate Division Code. For Example:</p> <ul style="list-style-type: none"> o A05 = AS - Materiel o A10 = AS - TSB
13.	<p>Click the Address Information tab.</p> <p>Address Information</p>

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Step	Action
14.	<p>ADDRESS INFORMATION</p> <p>Information specific to new address book record must be entered in appropriate format.</p> <p>Note: For V, VP, and PP records, DBA Name should be listed in the Alpha Name & Address Line 1/DBA fields</p> <p>Note: Some information is required for request submission.</p>
15.	<p>Long Address Number</p> <p>Long Address Information use varies based on Search Type.</p> <ul style="list-style-type: none"> o F - may be used to indicate an Agency specified "billing code" o C - may be used to indicate an Agency specified "billing code" o PP - Last 4-digits of Bank Account number (Example: X1235) o BV - Client Case number <p>Note: This field is only required for Search Type BV</p>

Step	Action
16.	<p>Alpha Name</p> <ul style="list-style-type: none"> o 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. For example: <ul style="list-style-type: none"> o Enter John O'Brien as OBRIEN, JOHN o Enter HFI, Inc. as HFI INC o Enter JONES-SMITH, CONNIE as JONES SMITH, CONNIE o Enter Ebay.com as EBAY COM o Title and Suffix are not included in the Alpha Name. For example: <ul style="list-style-type: none"> o Enter Dr. John Smith as SMITH, JOHN o Enter John Smith Jr. as SMITH, JOHN o Do not enter the word, "the." For example: <ul style="list-style-type: none"> o Enter The Money Company as MONEY COMPANY o Unless this 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. o Only one 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. For example: <ul style="list-style-type: none"> o Enter Betty and Bob Jones as JONES, BETTY or JONES, BOB depending on who owns the Social Security Number provided with the request o <i>Note:</i> Both names can be entered in the Mailing Name field below. o If possible, do not abbreviate (Ex. Nebraska State Fair should be entered NEBRASKA STATE FAIR, not NE STATE FAIR.)
17.	<p>Mailing Name</p> <p>Enter the name as it should appear on the warrant. The Mailing Name field is the first line that appears on the printed warrant. For Example:</p> <ul style="list-style-type: none"> o Enter Dr. John Smith, Jr. as DR JOHN SMITH, JR o If this is a DBA, enter the name of the person who owns the Social Security Number or the name of the parent company who owns the Federal Tax ID entered on this request.

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Step	Action
18.	<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, VP, and PP records, remember to list any DBA's in the Address Line 1/DBA field and move the address to the Address Line 2 field.</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>
19.	<p>Address Lines</p> <ul style="list-style-type: none"> o Address lines can be an extension of the Mailing Name if the Mailing Name field is not large enough to accommodate the entire name. o Only a confirmed mailing address should be entered. (A confirmed mailing address can be found on www.usps.com or other legitimate websites such as www.whitepages.com or www.switchboard.com) o If both a physical address and a PO Box are entered, the PO Box is entered on the bottom (higher Address Line field). o Both a PO Box and RR address should not be entered. <ul style="list-style-type: none"> o Mail for a PO Box is delivered to the post office. o A RR is for a rural customer who receives mail at their house in the country. o If a mailing address includes a suite # or an apartment #, the complete address must be entered on one line (Ex. 1542 A Street # 5). o If this is a DBA, enter DBA "operating business name" in Address Line 1/DBA (Ex. DBA SMITH CONSTRUCTION). Enter the mailing address in Address Line 2.

Step	Action
20.	<p>Address Lines: Common Street Suffix Abbreviations</p> <p>The US Post Office has standardized abbreviations for Addresses. To maintain standardization with the ERP system and to reduce mailing costs, it is important to maintain the same abbreviation standards.</p> <p>The following is a list of common abbreviations:</p> <p>Alley = ALY Avenue = AVE Bypass = BYP Center = CTR Circle = CIR Court = CT Expressway = EXPY Fort = FT Freeway = FWY Heights = HTS Highway = HWY 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>
21.	<p>Address Lines: Common Secondary Unit Abbreviations</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>

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Step	Action
22.	<p>City</p> <p>Do not use punctuation or abbreviation. For example:</p> <ul style="list-style-type: none"> o Enter O'Neill as ONEILL o Enter St. Paul as SAINT PAUL
23.	<p>State</p> <p>Enter State 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 Comments section indicate correct State, Zip Code, and Country.</p>
24.	<p>Zip Code + 4 Digit Extension</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>
25.	<p>Country</p> <p>A blank field is acceptable for United States.</p> <p>Will populate with country based upon State selection.</p>
26.	<p>Phone Number & Fax Number</p> <p>Enter Phone Number and Fax Number of Contact.</p> <p>Format:</p> <ul style="list-style-type: none"> o Area Code o 471-1234 (for number with an extension: 471-1234 ext 9856) <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.</p>
27.	<p>Tax Entity Code is a required field.</p> <p>C = Corporate Entity - FTIN</p> <ul style="list-style-type: none"> o Corporation o 501C3, or o Political Subdivision <p>N = Non-Corporate Entity - FTIN</p> <ul style="list-style-type: none"> o Partnership o LLC o Sole Proprietor - FTIN <p>P = Individual - Social Security Number</p> <p>Reference Training Guide - Tax Entity Code Guidance for further clarification.</p>

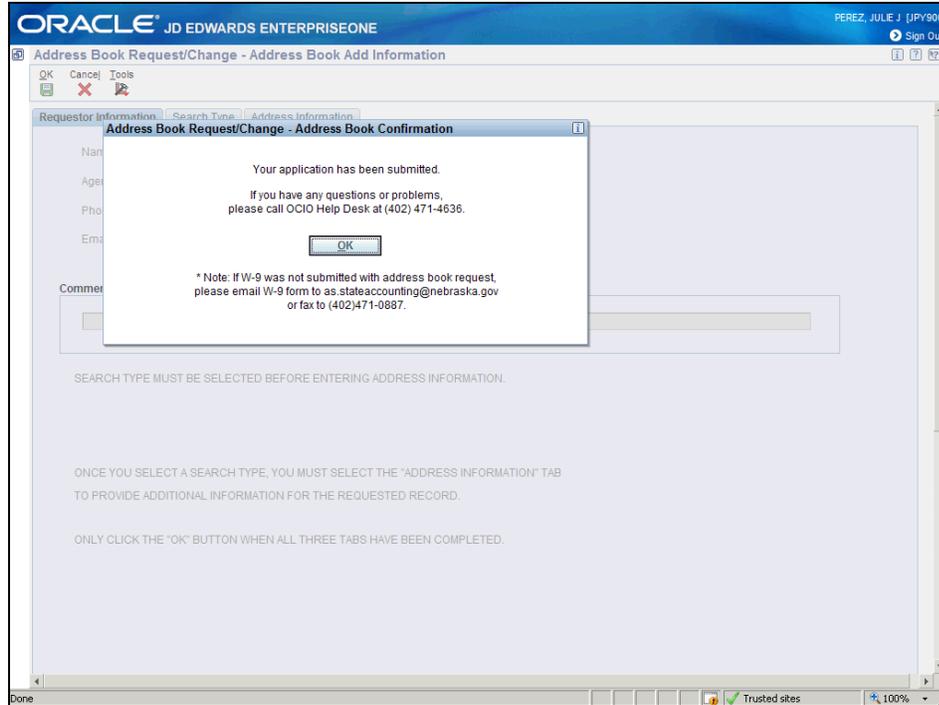
Step	Action
28.	<p>Tax ID or SSN</p> <p>Complete this information for the following Search Types:</p> <ul style="list-style-type: none"> o C - Customer (Outside State Government) o N - Non-Employee (State Board or Committee Member Expense Reimbursements) o V - Vendor (Procurement Purposes and payments) o PP - Payment (Payments mad, and not included in any other criteria) o VP - Political Subdivision (Receives payments from the State)
29.	<p>Tax ID or SSN</p> <ul style="list-style-type: none"> o The Tax ID is the business's Federal Tax ID or the individual's social security number. o Do not enter dashes in this field (Ex.506-23-1111 should be entered 506231111)
30.	<p>The address book record can store Email Addresses for two purposes.</p> <p>The Contact Email Address provides system users with information regarding how to contact an individual within an entity.</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> <p><i>Note:</i> If an Email Address will be used for both communication and ACH Notification, both fields must be completed.</p>
31.	<p>ACH Email Address</p> <p>Used for electronic notification within system. This includes ACH Payment notification to Vendors and Political Subdivisions.</p> <p><i>Note:</i> There can only be one ACH Email Address assigned to an Address Book record.</p> <p>May be added for most NEW address book records. Changes must be requested through State Treasurer's Office.</p>

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Step	Action
32.	<p>ATTACHMENTS</p> <p>Attachments can be included with requests for new Address Book records or changes to existing Address Book records.</p> <p>Attachments can be W-9s or Text Attachments.</p> <p>Note: 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>
33.	<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
34.	<p>The request will be sent to AS - State Accounting - Address Book Section for review and processing. Once processed, an automatic email will be sent to the Requestor's email address with the new address book number.</p>
35.	<p>Click the OK button.</p> 



Step	Action
36.	Click the OK button. 
37.	Continue to new requests or click the Cancel button. 
38.	Click the Close button. 
39.	You have successfully completed this lesson. End of Procedure.