

## **Address Book Request - Change**

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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 Request - Change

### Address Book Request - Change Overview

Requests to change existing address book records must be submitted to the AS State Accounting, Address Book Team.

The Address Book Role AB09 does not have the ability to submit Address Book Requests. An end user must have an Address Book role other than AB09 in order to access the Address Book Request application.

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

- Vendor (V) – Procurement, PO's, Contracts and Payments to Businesses, Entities, Vendors, Suppliers, and Individuals
- Facility (F) – State Agency locations for Print Shop deliveries and mailing addresses, and IBT Processing
- Customer (C) – Receivables Invoice Processing (outside of State Government) and Print Shop deliveries
- Political Subdivision (VP) – Political Subdivision (city, county, etc.) that will receive payments from the State
- Blind and Visually Impaired Client (BV) – Used only by the Commission for the Blind and Visually Impaired
- Non-Employee (N) – Used only by Authorized Agents for System User Access

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. **Note:** Any record that does not have a W-9 is also required to have a W-9 at the time the change request is submitted. The agency may still enter the vendor Address Book Request, but the request will be placed on temporary hold until the completed Substitute W-9 form is submitted to AS State Accounting via:

- **PREFERRED:** An attachment to a request using the Address Book Request application
- FAX to (402) 471-0887
- E-mail: [as.stateaccounting@nebraska.gov](mailto:as.stateaccounting@nebraska.gov); Subject Line: "W-9"
- Interagency Mail

Substitute W-9 forms are required for the following:

- Change of Parent Company or DBA (Doing Business As) name – send request through as a Change rather than submitting an Add if the name change affects an existing Address Book record.
- Change of Federal Tax ID number (FTIN/EIN) - again, send a change request if the information affects an existing Address Book record.
- Business is operating under an individual's Social Security Number
- Any existing record that does not have a W-9 on file

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## Address Book Request - Change



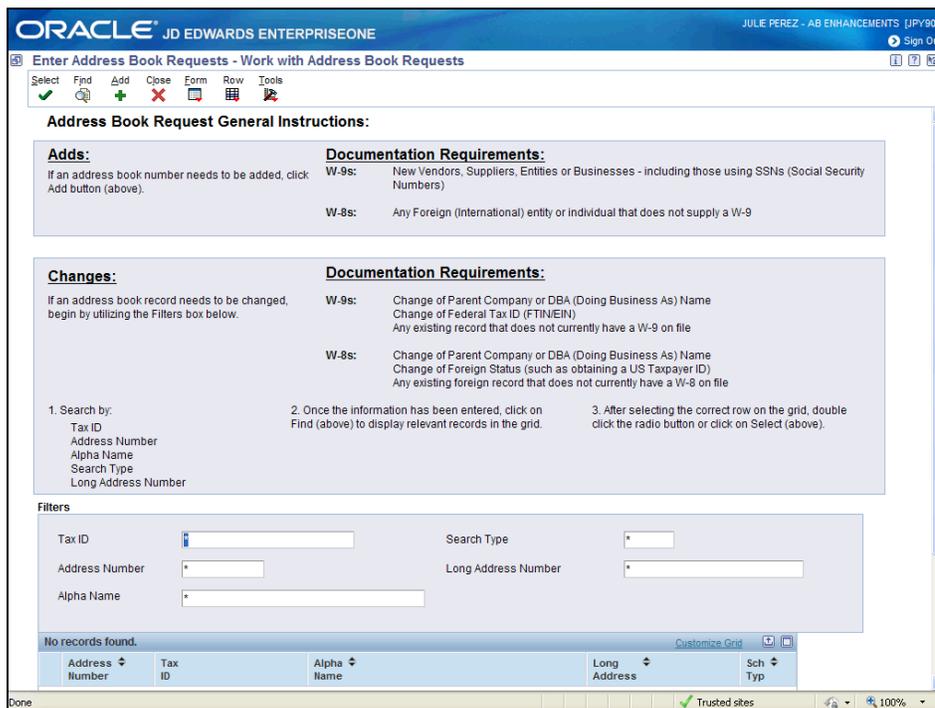
Payment Terms – Address Book records typically default to Net 30 when they are created. Clientele payment terms can be applied to existing records by making a note to apply “Clientele Payment Terms” in the Comments field. If necessary, Payment Terms can be changed on payment by payment bases by using the Special Handling field in Voucher Processing.

## Address Book Request - Change

### Procedure

In this lesson you will learn how to perform the Address Book Request for a Change.

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 <b>State of Nebraska</b> link. <a href="#">State of Nebraska</a>
3.	Click the <b>Address Book</b> link. <a href="#">Address Book</a>
4.	Click the <b>Enter Address Book Requests</b> link. <a href="#">Enter Address Book Requests</a>



Step	Action
5.	Read through the " <b><u>General Instructions: Changes:</u></b> " for <b><u>Documentation Requirements:</u></b>
6.	<b>Filters section</b>  Use Filters to Narrow Search for Address Book Record(s) to be Changed.
7.	<b>Filters</b>  <ul style="list-style-type: none"> <li>o Tax ID</li> <li>o Address Number</li> <li>o Alpha Name</li> <li>o Search Type</li> <li>o Long Address Number</li> </ul>
8.	Click the <b>Find</b> button. 
9.	The record at the top of the grid will automatically be selected (see Radio Button). To request a change to a different record, select the correct Radio Button.
10.	To select the correct Address Book record, click the option to the left of the record in the grid row. 
11.	Click the <b>Select</b> button. 

The screenshot shows the Oracle JD Edwards EnterpriseOne interface for entering address book information. The window title is "Enter Address Book Requests - Address Book Add Information". The user is logged in as "JULIE PEREZ - AB ENHANCEMENTS (JPY900)".

The form has three tabs: "Requester Information", "Address Information", and "Bank Account". The "Requester Information" tab is active. It contains two sections: "Notification of Address Book Record Update" and "Requester".

**Notification of Address Book Record Update:**

- Name: JULIE PEREZ - AB ENHANCEMENTS
- Agency: 065 ADMINISTRATIVE SERVICES
- Phone: 402 - 471-0628
- Email Address: julie.perez@nebraska.gov

**Requester:**

- Name: JULIE PEREZ - AB ENHANCEMENTS
- Agency: 065 ADMINISTRATIVE SERVICES
- Phone: 402 - 471-0628
- Email Address: julie.perez@nebraska.gov

Instructions at the bottom of the form: "UPDATE THE NOTIFICATION INFORMATION IF YOU ARE ENTERING A REQUEST ON BEHALF OF SOMEONE ELSE." and "CLICK ON THE ADDRESS INFORMATION TAB TO CONTINUE."

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Step	Action
12.	<p><b>NOTIFICATION OF ADDRESS BOOK RECORD UPDATE</b></p> <ul style="list-style-type: none"> <li>o Name</li> <li>o Agency</li> <li>o Phone</li> <li>o Email Address - confirmation of Address Book record creation or update will be e-mailed to this address</li> </ul> <p>Notification Information is <b>required</b> and defaults to the Requester Information, but can be overridden if desired.</p>
13.	<p><b>REQUESTER INFORMATION</b></p> <ul style="list-style-type: none"> <li>o Name</li> <li>o Agency</li> <li>o Phone</li> <li>o Email Address</li> </ul> <p>Requester information is <b>required</b>. 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>
14.	<p>Click the <b>Address Information</b> tab.</p> <p><a href="#">Address Information</a></p>
15.	<p><b>ADDRESS INFORMATION tab</b></p> <p>Information specific to the updated 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 <b>Alpha Name</b> and <b>Address Line 1/DBA</b> fields.</p>

Step	Action
16.	<p><b>Alpha Name</b></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"> <li>o John O'Brien = OBRIEN, JOHN</li> <li>o HFI, Inc. = HFI INC</li> <li>o Connie Jones-Smith = JONES SMITH, CONNIE</li> <li>o Ebay.com = EBAY COM</li> </ul> <p>Title and Suffix are not included in the Alpha Name.</p> <ul style="list-style-type: none"> <li>o Dr. John Smith = SMITH, JOHN</li> <li>o John L. Smith, MD = SMITH, JOHN L</li> <li>o John Smith Jr. = SMITH, JOHN</li> </ul> <p>Do not enter the word, "The" or "A".</p> <ul style="list-style-type: none"> <li>o The Money Company = MONEY COMPANY</li> <li>o A Better Way Service = BETTER WAY SERVICE</li> </ul> <p><b>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.</b></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"> <li>o JONES, BETTY or</li> <li>o JONES, BOB</li> </ul> <p>Note: Both names can be entered in the <b>Mailing Name</b> field.</p> <p>If possible, do not abbreviate.</p> <ul style="list-style-type: none"> <li>o Nebraska State Fair = NEBRASKA STATE FAIR, not NE STATE FAIR.</li> </ul> <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"> <li>o HOLIDAY INN – DES MOINES IA</li> <li>o HOLIDAY INN – SCOTTSBLUFF</li> </ul> <p>VP records should include specific agency, division, etc.</p> <ul style="list-style-type: none"> <li>o LINCOLN CITY OF – WATER SYSTEM</li> <li>o LANCASTER COUNTY - REGISTER OF DEEDS</li> </ul>
17.	<p><b>W-9 Information Section</b> <b>or</b> <b>General Information Section</b></p>

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Step	Action
18.	<p><b>Mailing Name</b></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 “&amp;”.</p> <ul style="list-style-type: none"> <li>o Dr. John Smith, Jr. = DR JOHN SMITH JR</li> <li>o 4/D Trenching and Excavating, L.L.C. = 4-D TRENCHING &amp; EXCAVATING LLC</li> </ul> <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>Note: 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><b>Address Verification</b></p> <p>Verify proper Address Information through <a href="http://www.usps.com">www.usps.com</a> &gt; Find a Zip Code.</p> <p>Reference Training Guide - Address Verification - USPS.</p> <p>Note: For V and VP records, remember to list any DBA's in the <b>Address Line 1/DBA</b> field and begin entering the address in the <b>Address Line 2</b> field.</p> <p><b>To ensure accuracy of data and compliance with USPS standards, copy address information directly from <a href="http://www.usps.com">www.usps.com</a>.</b></p>

Step	Action
20.	<p><b>Address Lines</b></p> <p>The only punctuation allowed are hyphens “-“, ampersands “&amp;”, and in care of “C/O”.</p> <ul style="list-style-type: none"> <li>o CITY LIBRARY - AUBURN MEMORIAL LIBRARY</li> <li>o POWER &amp; IRRIGATION</li> <li>o C/O CHARLES DALE - TREASURER</li> </ul> <p>Address lines can be an extension of the Mailing Name if the <b>Mailing Name</b> 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 <a href="http://www.usps.com">www.usps.com</a>.)</p> <p>If both a physical address and a PO Box are entered, enter the physical address before entering the PO Box in the <b>Address Line</b> fields.            Physical Address = 101 North State Street and Mailing Address = P.O. Box 123</p> <ul style="list-style-type: none"> <li>o Address Line 1: 101 N STATE ST</li> <li>o Address Line 2: PO BOX 123</li> </ul> <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"> <li>o Address Line 1: 1542 A ST APT 5</li> </ul> <p><b>DO NOT</b> enter:</p> <ul style="list-style-type: none"> <li>o Address Line 1: 1542 A ST</li> <li>o Address Line 2: #5</li> </ul> <p>If this is a DBA, enter DBA "operating business name" in <b>Address Line 1/DBA</b> field.</p> <ul style="list-style-type: none"> <li>o Address Line 1: DBA SMITH CONSTRUCTION</li> <li>o Address Line 2: 123 MAIN ST</li> </ul>

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Step	Action
21.	<p><b>Address Lines: Common Street Suffix Abbreviations</b></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><b>If the information provided by <a href="http://www.usps.com">www.usps.com</a> differs from the following list of abbreviations, use the information provided by USPS "Look Up a Zip Code".</b></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>Note: Additional abbreviations can be found on the United States Postal Service web-site at <a href="http://www.usps.com">www.usps.com</a>.</p>
22.	<p><b>Address Lines: Common Secondary Unit Abbreviations</b></p> <p><b>If the information provided by <a href="http://www.usps.com">www.usps.com</a> differs from the following list of abbreviations, use the information provided by USPS "Look Up a Zip Code".</b></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><b>Note:</b> Additional abbreviations can be found on the United States Postal Service web-site at <a href="http://www.usps.com">www.usps.com</a>.</p>

Step	Action
23.	<p><b>City</b></p> <p>Do not use punctuation or abbreviation.</p> <ul style="list-style-type: none"> <li>o O'Neill = ONEILL</li> <li>o St. Paul = SAINT PAUL</li> </ul> <p>Use appropriate spacing according to <a href="http://www.usps.com">www.usps.com</a>.</p> <ul style="list-style-type: none"> <li>o La Vista = LA VISTA</li> <li>o McCook = MCCOOK</li> </ul>
24.	<p><b>State</b></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 <b>City</b> field and NE in the <b>State</b> field. In the <b>Comments</b> field indicate the correct State (or Province), Zip Code, and Country.</p>
25.	<p><b>Zip Code + Four</b></p> <p>Enter the applicable ZIP+4 according to <a href="http://www.usps.com">www.usps.com</a>.</p> <p><b>Note:</b> The 4-Digit Extension is a requirement. See instructions for finding Zip Code + 4 Digit Extension at <a href="http://www.usps.com">www.usps.com</a>.</p> <p>The 4-Digit Extension will be different for every address.</p> <p><b>Note:</b> In the case of foreign addresses, enter the supplied Postal Code instead of the ZIP+4.</p>

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## Address Book Request - Change



ORACLE JD EDWARDS ENTERPRISEONE JULIE PEREZ - AB ENHANCEMENTS [JPY900] Sign Out

Enter Address Book Requests - Address Book Add Information

OK Cancel Tools

**W-9 Information:**  
Information contained below will be printed on a warrant.

**Contact Information:**

Mailing Name \* OPUS 3 ARTISTS/ARTISTS ACQUISITION LLC  
 Address Line 1/DBA \* 470 PARK AVE S FL 9 N  
 Address Line 2  
 Address Line 3  
 Address Line 4  
 City \* NEW YORK  
 State \* NY  
 Zip + Four \* 10016-5428

Phone Number 212 584-7546  
 Format Example: 402 471-1234 X1234  
 Fax Number 646 300-8246  
 Vendor Contact Email

**TIN and Federal Tax Classification:**

Tax Entity Code (P, C, or N) \* N  
 FTIN/EIN or SSN \* 385365365

\*\* Do not use dashes, spaces, or special characters.  
 Example: 012345678 (include leading zeroes)

For International Vendors, enter the US Taxpayer ID from the W-8 form.  
 Otherwise, enter the word FOREIGN.

**Supplemental Information:**

Country USA  
 County Code  
 Congress Dist  
 DUNS Number  
 Agency Defined  
 Long Address Number AG: X3954  
 Business Unit 1

CLICK THE "OK" BUTTON WHEN ALL TABS HAVE BEEN COMPLETED.

Done Trusted sites 100%

Step	Action
26.	<b>TIN and Federal Tax Classification section</b>
27.	<p><b>Tax Entity Code (P, C, or N)</b></p> <p>C = Corporate Entity for a Federal Tax ID (FTIN) or Employer Identification Number (EIN)</p> <ul style="list-style-type: none"> <li>o Corporation           <ul style="list-style-type: none"> <li>- C Corp</li> <li>- S Corp</li> </ul> </li> <li>o Non-Profit Entity</li> <li>o LLC           <ul style="list-style-type: none"> <li>- C-Corp</li> <li>- S-Corp</li> </ul> </li> </ul> <p>N = Non-Corporate Entity – FTIN/EIN</p> <ul style="list-style-type: none"> <li>o Sole Proprietor</li> <li>o Partnership</li> <li>o Trust/Estate</li> <li>o LLC           <ul style="list-style-type: none"> <li>- P - Partnership</li> </ul> </li> <li>o Political Subdivision</li> <li>o Facility</li> </ul> <p>P = Individual - Social Security Number (SSN)</p> <ul style="list-style-type: none"> <li>o Sole Proprietor</li> <li>o Client</li> <li>o Board or Commission Member</li> </ul>

Step	Action
28.	<p><b>FTIN/EIN or SSN</b></p> <p>Complete this information for the following Search Types:</p> <ul style="list-style-type: none"> <li>o Vendor (V)</li> <li>o Customer (C)</li> <li>o Political Subdivision (VP)</li> <li>o Blind and Visually Impaired Client (BV)</li> </ul> <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"> <li>o 506-11-1111 = 506111111</li> </ul> <p>Include leading zeroes.</p> <ul style="list-style-type: none"> <li>o 047-69-6969 = 047696969</li> </ul> <p>For International Vendors, enter the US Taxpayer ID from the W-8 form. Otherwise, enter the word FOREIGN.</p>
29.	<p><b>Contact Information section</b></p>
30.	<p><b>Phone Number &amp; Fax Number</b></p> <p>Enter Phone Number and Fax Number of Contact.</p> <p>Format:</p> <ul style="list-style-type: none"> <li>o Area Code</li> <li>o 471-1234 (for number with an extension: 471-1234 X1234)</li> </ul> <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><b>Vendor Contact Email</b></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><b>Supplemental Information section</b></p>
33.	<p><b>Country</b></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><b>County Code</b></p> <p>County in Nebraska where entity or individual is physically located.</p>

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Step	Action
35.	<p><b>Congress Dist</b></p> <p>Congressional District as defined by the 2010 US Census Bureau (<a href="http://www.census.gov/2010census/popmap">www.census.gov/2010census/popmap</a>).</p>
36.	<p><b>DUNS Number</b></p> <p>Provided by organization or Political Subdivision.</p>
37.	<p><b>Agency Defined</b></p> <p>This field is used for specific agencies.</p>
38.	<p><b>Long Address Number</b></p> <p>Long Address Information use varies based on Search Type.</p> <p>Facility (F) &amp; Customer (C) – may be used to indicate an Agency specified "billing code"</p> <p>Vendor (V) – Last 4-digits of Bank Account number</p> <ul style="list-style-type: none"> <li>o AG X1234 – All Agencies</li> <li>o AG 13 X1234 – Only Agency 13 (Department of Education)</li> </ul> <p>Blind &amp; Visually Impaired Commission Client (BV) – Client Case number</p> <p><i>Note:</i> This field is only required for Search Type BV.</p>
39.	<p><b>Business Unit</b></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><b>Send Invoice To</b></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 <b>Address Information tab</b> to verify all required fields are complete and optional fields are filled as desired.</p>
42.	<p>Click the <b>Bank Account</b> tab.</p> <p><a href="#">Bank Account</a></p>

The screenshot shows the Oracle JD Edwards EnterpriseOne interface for 'Enter Address Book Requests - Address Book Add Information'. The 'Bank Account' tab is active, displaying the following fields and options:

- ACH Email \*\* (text input field)
- \*\* Used for electronic notification within system. This includes ACH Payment notification to Vendors and Political Subdivisions
- Bank Transit Number (text input field)
- Bank Account Number (text input field)
- Checking or Savings Account (checkbox)
- Payment Instrument:  T NIS - EFT - CTX
- Pre-Note Code:  N NOT PROCESSED THROUGH PRE-N

A note at the bottom of the form reads: 'CLICK THE "OK" BUTTON WHEN ALL TABS HAVE BEEN COMPLETED.'

Step	Action
43.	<p><b>BANK ACCOUNT tab</b></p> <p>Enter the ACH information as listed on the ACH Enrollment form.</p> <p><b>Note: DO NOT</b> 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><b>ACH Email</b></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><b>Bank Transit Number</b></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><b>Bank Account Number</b></p> <p>Do not enter dashes or spaces.</p>

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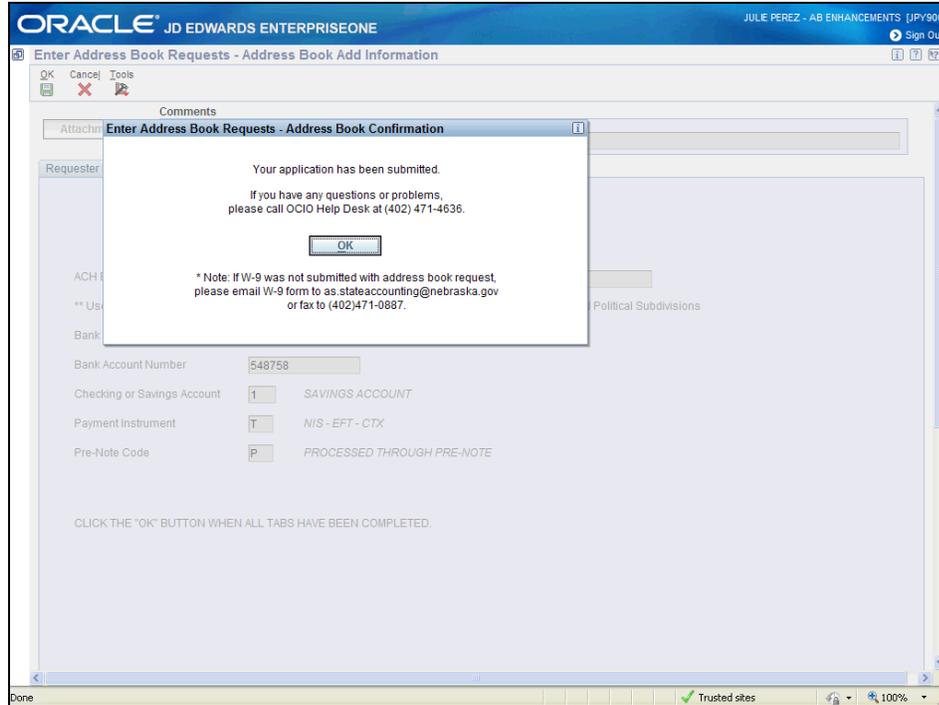
Step	Action
47.	<p><b>Checking or Savings Account</b></p> <p>Select the appropriate account type.</p> <p>0 = Checking 1 = Savings</p>
48.	<p><b>Payment Instrument</b> field and <b>Pre-Note Code</b> field will populate as needed when the ACH information is entered.</p> <p><i>Note:</i> All ACH information is sent through the 10 day pre-note process.</p>
49.	<p><b>Comments</b></p> <p>Communicate information specific to this request.</p> <p>This can include information like:</p> <ul style="list-style-type: none"> <li>o Request to change a Search Type to a different Search Type. **</li> <li>o Associate an existing Vendor (V) address book record (physical location) to a request for another Vendor (V) record (remit address).</li> <li>o Indicate attachments to the submitted request</li> <li>o Additional information to be communicated to AS State Accounting</li> </ul> <p>Note: Any information that does not fit in the Comments field can be included as a text attachment.</p> <p>Note: This information does not remain in the system for future reference.</p>

Step	Action
50.	<p><b>Attachments</b></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"> <li>o W-9s</li> <li>o ACH documentation</li> <li>o Text Attachments</li> <li>o Any other documents specific to the Address Book request</li> </ul> <p><b>Note:</b> 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 <b>NOT</b> automatically attached to new or existing Address Book records.</p> <p>Using the <b>Attachments</b> 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"> <li>o PREFERRED: An attachment to a request using the Address Book Request application</li> <li>o FAX to (402) 471-0887</li> <li>o E-mail: <a href="mailto:as.stateaccounting@nebraska.gov">as.stateaccounting@nebraska.gov</a>; Subject Line: "W-9"</li> <li>o Interagency Mail</li> </ul> <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>

# Training Guide

## Address Book Request - Change

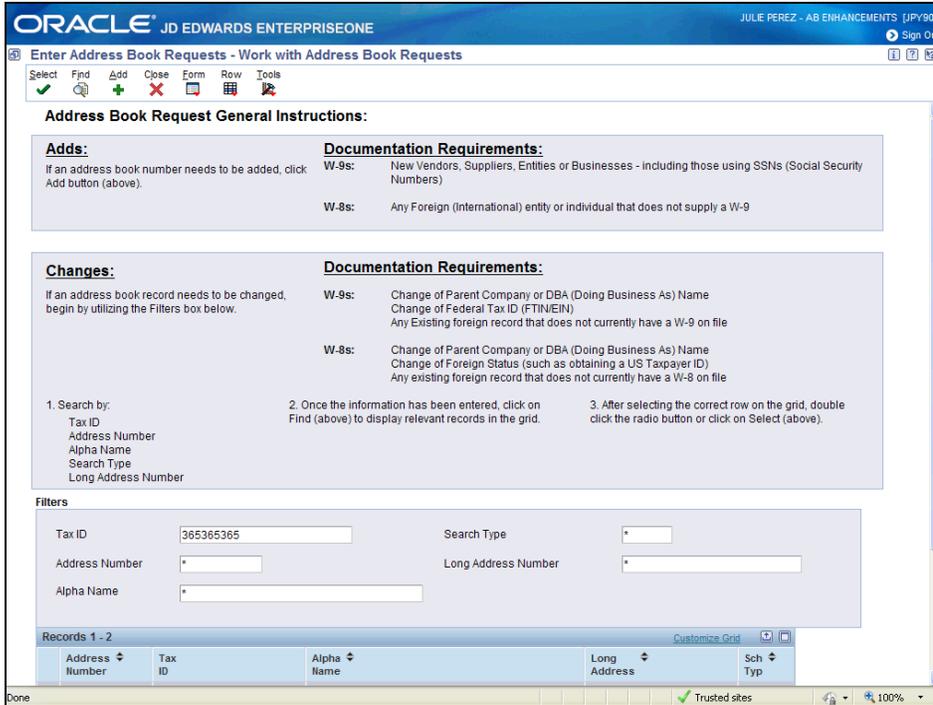
Step	Action
51.	Review Bank Account Information to verify all required fields are complete.
52.	Click the <b>OK</b> button. 



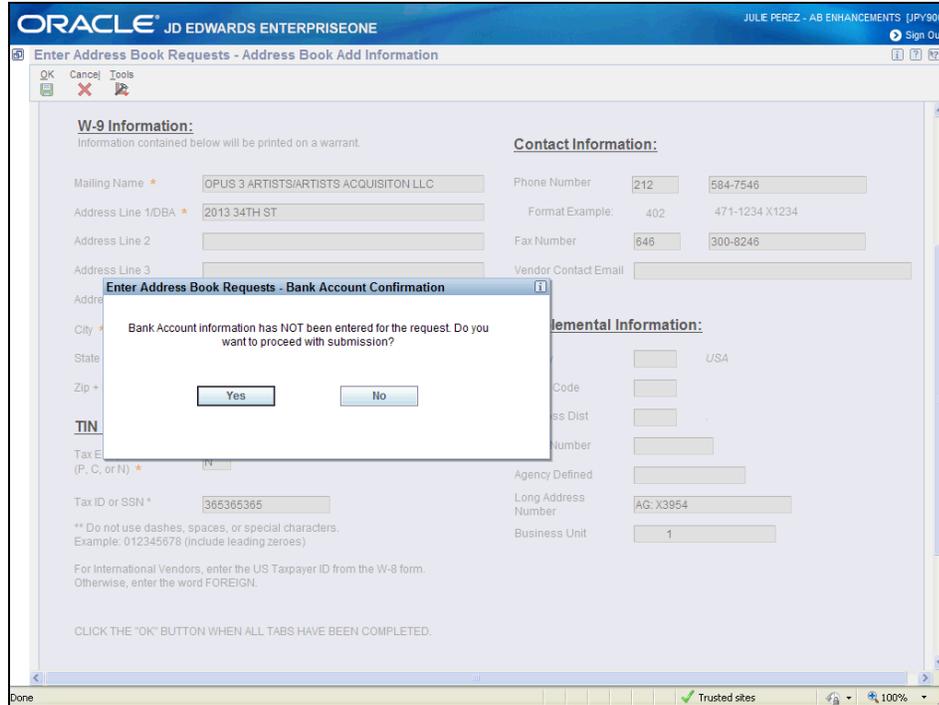
Step	Action
53.	Click the <b>OK</b> button. 
54.	<p><b>Decision:</b> Select the appropriate action:</p> <ul style="list-style-type: none"> <li>• There are no more Address Book Change Requests Go to step 55 on page 18</li> <li>• Update Address Information Go to step 57 on page 18</li> <li>• Update Bank Account Information Go to step 65 on page 19</li> <li>• Update Address Information and Bank Information Go to step 5 on page 3</li> </ul>

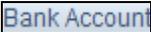
# Training Guide

## Address Book Request - Change



Step	Action
55.	Click the <b>Close</b> button. 
56.	<b>End of Procedure.</b> Remaining steps apply to other paths.
57.	Click in the <b>Tax ID</b> field. 
58.	Enter the desired information into the <b>Tax ID</b> field.
59.	Click the <b>Find</b> button. 
60.	To select the correct Address Book record, click the option to the left of the record in the grid row. 
61.	Click the <b>Select</b> button. 
62.	Click the <b>Address Information</b> tab. 
63.	<b>Note:</b> Some Address Book records may not have "complete" <b>Zip + Four</b> information. If an address book record is updated, the Zip + Four is required.



Step	Action
64.	Bank Account Information is NOT required on a "Change" if the Bank Account information is current. If you are only updating information on the Address Information tab, click "Yes" to submit Change Request.  If you want to include new Banking Information, click "No" to proceed with updating this information. Go to step 54 on page 17
65.	Click in the <b>Tax ID</b> field. 
66.	Enter the desired information into the <b>Tax ID</b> field.
67.	Click the <b>Find</b> button. 
68.	To select the correct Address Book record, click the option to the left of the record in the grid row. 
69.	Click the <b>Select</b> button. 
70.	Click the <b>Bank Account</b> tab. 

# Training Guide

## Address Book Request - Change



Step	Action
71.	<p><i>Note:</i> Bank Account information will always appear as "BLANK", even if Bank Account information exists for the Address Book record. This is to prevent end users from accessing Bank Account data.</p> <p>If updating existing information, enter new data and include Attachments with new bank account information.</p> <p>Go to step 54 on page 17</p>