

Hallsville 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 (including EDGAR) related to vendor relations and procurement by a school district.

Vendor Application

- ❑ The requestor shall forward the Vendor Application Packet 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 Hallsville ISD as additional insured, if applicable)
- ❑ The completed Vendor Application Packet should be forwarded by the requestor to the Assistant Business Manager.

Vendor Review and Approval

- ❑ The Assistant Business Manager shall review the packet to ensure that all required items have been submitted and are properly executed, including the signature of an authorized individual.
- ❑ If the vendor will perform services on Hallsville ISD Property, the vendor must provide the Certificate of Insurance (with Hallsville 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 final approval, the vendor shall be added on the vendor database

Vendor Database Management

- ❑ The Accounting/Purchasing Specialist 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
- ❑ Prior to adding a new vendor, the Assistant Business Manager shall verify if the vendor does not exist in the Vendor Database in an active or inactive status.

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- If the vendor does exist, and the vendor identification information is the identical, the inactive vendor may be reactivated.
- ❑ The Assistant Business Manager shall make changes to the vendor database upon receipt from a vendor of a change in address, phone number, email, etc.
- ❑ The vendor should notify the district of a change of their company name, tax identification number, etc. as soon as possible.
- ❑ At the end of each calendar year, the Assistant Business Manager/Purchasing Agent shall review vendor activity to determine which vendors, if any, to inactivate.