

## Vendor Manager System

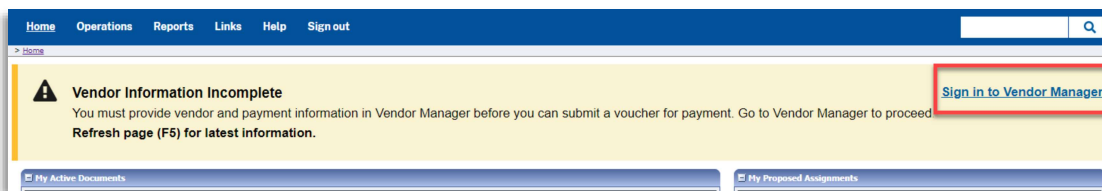
The Vendor Manager System (VMS) is a web-based application that is used to collect W9, electronic fund transfer (EFT) payment, and employee-business relationship information for CJA payees and business entities. Vendor information syncs with JIFMS and other tenants such as eVoucher, allowing a single source of information to be shared throughout applications.

Before you can sign in and create a vendor account in the VMS application, you must have a Login.gov account. If you do not have one already, refer to the Login.gov job aids for detailed instructions on how to create a Login.gov account and sign in to eVoucher.

## Creating a Vendor Account with an EIN

### Step 1

Sign in to eVoucher. A Vendor Information Incomplete message appears at the top of your eVoucher home page. Click the **Sign in to Vendor Manager** link to create your vendor account profile.



**Note:** You must create and link a VMS account to your eVoucher account before you can submit a voucher for payment.

### Step 2

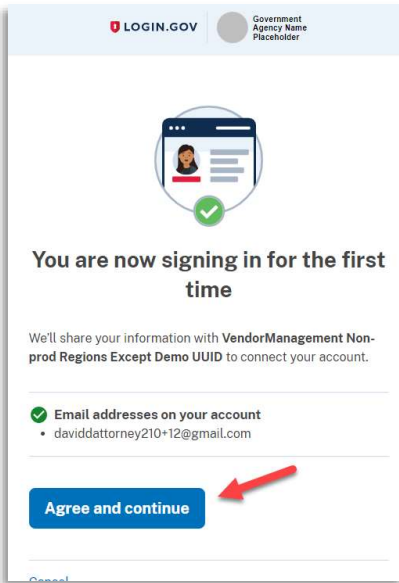
You are redirected to the Vendor Manager sign in page. Click **Sign in with LOGIN.GOV**.



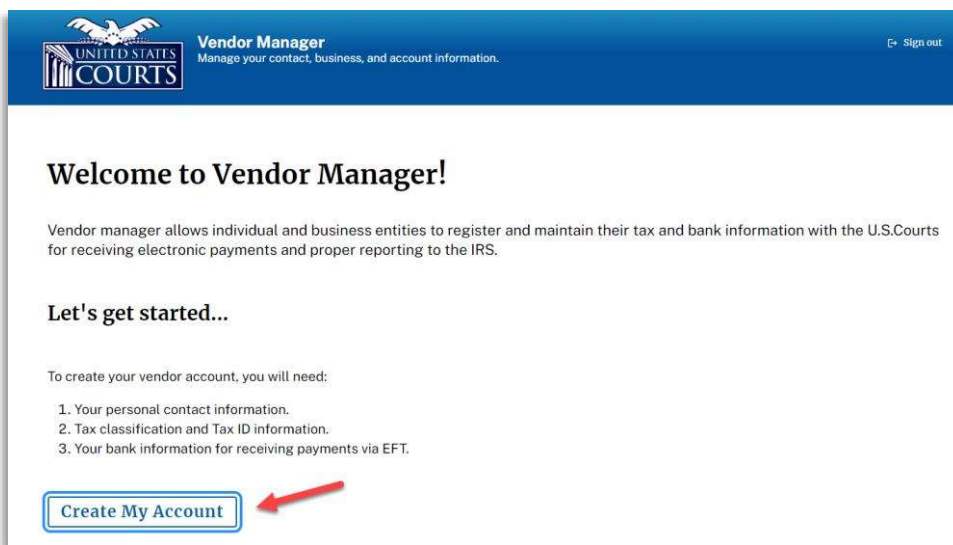
**Note:** Because you were already signed in to eVoucher, you aren't required to reverify your information in Login.gov. However, if for any reason you signed out of Login.gov or your authentication token expired (after 15 min.), you are required to sign in through Login.gov.

**Step 3**

The first time you sign in to the VMS, a message appears showing the information that you're sharing with the VMS to connect your account. Click **Agree and continue**.

**Step 4**

Once signed in to the VMS, you are directed to create your vendor account. Click **Create My Account** to get started.



The Vendor Account Setup includes five sections.

### Step 5

First, complete the Contact Information section. Your name and email address auto-populate, but you must complete the required **City, State, Zip/Postal Code, Phone, and Phone Type** fields.

**Vendor Account Setup**

1 Contact Information

Enter your personal contact information and mailing address. You will enter your Tax ID and payment info in the next steps.

First Name: David Middle (OPTIONAL): Last Name: Attorney Suffix (OPTIONAL): -Select-

Address: Apt/Ste # (OPTIONAL):

City: State (U.S. Only): -Select- Zip/Postal Code: -Select-

Country: UNITED STATES

Phone: ( ) - - - - - Phone Type: -Select- Primary: ☐

+ Add Additional Phone

Email Address: davidattorney210+12@gmail.com

Save and Continue

### Step 6

Click **Save and Continue**.

1 Contact Information

Enter your personal contact information and mailing address. You will enter your Tax ID and payment info in the next steps.

First Name: David Middle (OPTIONAL): Last Name: Attorney Suffix (OPTIONAL): -Select-

Address: 123 San Antonio Apt/Ste # (OPTIONAL):

City: San Antonio State (U.S. Only): TEXAS Zip/Postal Code: 78229

Country: UNITED STATES

Phone: (210) 555-5555 Phone Type: Mobile Primary: ☒

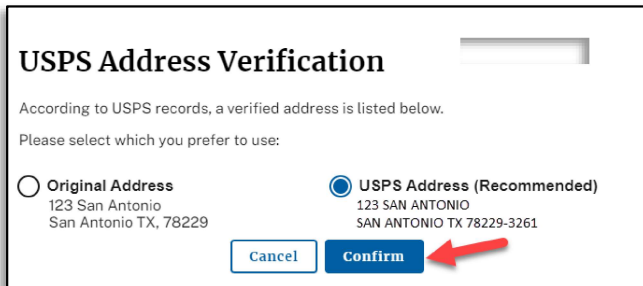
+ Add Additional Phone

Email Address: davidattorney210+12@gmail.com

Save and Continue

**Step 7**

The **USPS Address Verification** dialog box appears. Click a radio button to indicate the appropriate address format, and then click **Confirm**.



**USPS Address Verification**

According to USPS records, a verified address is listed below.

Please select which you prefer to use:

☐ **Original Address**  
123 San Antonio  
San Antonio TX, 78229

☒ **USPS Address (Recommended)**  
123 SAN ANTONIO  
SAN ANTONIO TX 78229-3261

**Step 8**

In the U.S. or Foreign Entity section, the **Yes** radio button is selected by default indicating that the vendor you are registering is a U.S. entity. The **No** radio button is disabled, as only U.S. entities are allowed to register in the VMS. Click the **EIN** radio button, and then click **Continue**.



**2 U.S. or Foreign Entity**

For tax purposes, is the vendor you are registering considered a U.S. Entity?

Answer **Yes** if the vendor is:

- An individual who is a U.S. citizen or U.S. resident alien;
- A partnership, corporation, company or association created or organized in the United States or under the laws of the United States;

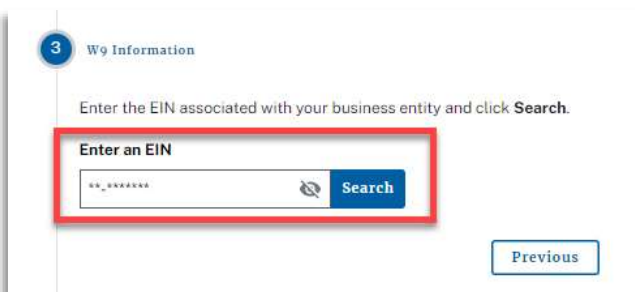
What type of **Tax Identification Number (TIN)** is associated with the vendor?

☒ Yes ☐ No <sup>1</sup> Only U.S. entities may register.

☐ SSN <sup>1</sup> ☒ EIN

**Step 9**

In the W9 Information section, fill out the EIN associated with your business entity and click **Search**.



**3 W9 Information**

Enter the EIN associated with your business entity and click **Search**.

**Enter an EIN**

00-000000

**Step 10a**

## Existing EIN

**Step 1**

If the EIN exists within the VMS, a **We found an existing EIN** success message appears. Verify the information is correct and click the checkbox to send the Authorized Agent a request to use the existing EIN for payments.

The screenshot shows a web form titled 'We found an existing EIN'. It contains a search bar with the text 'Enter an EIN' and a 'Search' button. Below the search bar, a green success message states: 'We found an existing EIN. Please verify that this is the correct business entity to receive payments.' The message lists the business details for 'David D Attorney' (123 Associate Firm San Antonio, San Antonio, TX 78245, TIN (EIN): \*\*\*-\*\*\*-60) and the 'Authorized Agent Contact Info' (David Attorney, davidattorney210+zz@gmail.com, (210) 555-5555). A checkbox labeled 'Use this business entity for payments. Upon submission, the system will notify the Authorized Agent of your request to use this business for payments.' is checked. At the bottom, there are 'Previous' and 'Send Request' buttons. A red arrow points to the 'Send Request' button.

**Step 2**

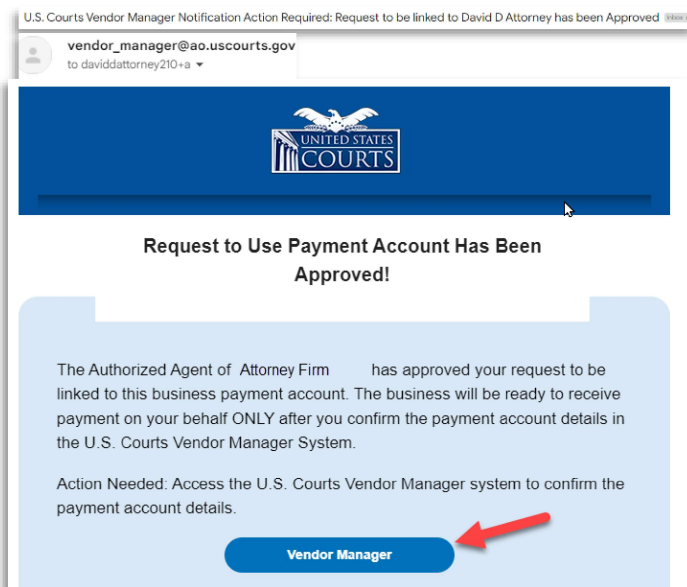
An email is sent to the Authorized Agent requesting approval to use this payment account. The payment account will appear as pending until the request is approved. Click **Ok**.

The screenshot shows the VMS interface. At the top, a blue banner displays the 'UNITED STATES COURTS' logo and the text 'Vendor Manager Manage your company, business and account information'. A green success message 'Link Request Sent!' is displayed, stating 'You will receive an email when approved to use this payment account.' with an 'Ok' button. Below the banner, the 'Contact Information' section shows the details for 'David D Attorney' (123 San Antonio, San Antonio, TX 78229, davidattorney210+a@gmail.com, (555) 555-5555) and an 'Edit Contact Info' button. The 'My Payment Accounts' section shows a list of payment accounts. The first account, 'New Payment Acct' (TIN (EIN): \*\*\*-\*\*\*-50), is highlighted with a red box and has a 'Pending Bank Info' button. The second account, 'David D Attorney' (TIN (EIN): \*\*\*-\*\*\*-60, Authorized Agent: David Attorney), is also highlighted with a red box and has a 'Pending Approval' button. A '+ Add New Payment Account' button is located at the top right of the 'My Payment Accounts' section.

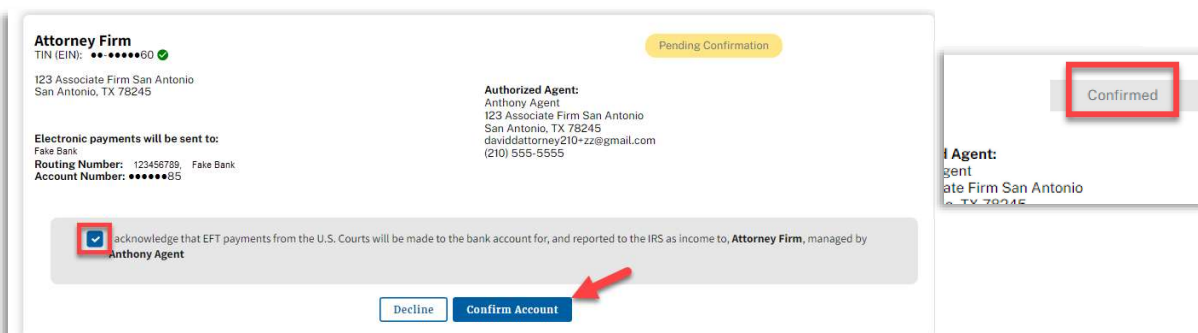
**Note:** To add another payment account using another EIN or SSN, click **Add New Payment Account**. Review the **Authorized Agent** job aid to learn more about the process for approving a pending payment account. To view the process for adding a new payment account an SSN, review the **Vendor Manager System for Individual** job aid.

**Step 3**

Once the Authorized Agent approves your request to link your account, you will receive an email that your request has been approved. Click **Vendor Manager** to confirm you want to link your account.

**Step 4**

From your VMS homepage, select the acknowledgement for EFT payments to be made to the bank account checkbox and then click **Confirm Account**. The yellow pending message changes to confirmed and you can now begin receiving payments.



**Step 10b**

## No Existing EIN

If the EIN does not exist within the VMS, a **No Matches Found** message appears. You can then choose to register an EIN as the authorized agent and manage the EIN payment account yourself, or you can notify someone acting as the authorized agent in your organization. Click **I am Authorized to Register this Business**.

**No Matches Found**  
A business entity must be registered with Vendor Manager to receive payments and IRS 1099 forms, if applicable. Are you authorized to register and manage this business entity?

By registering this business entity, I agree to:

- Maintain, and keep current, the address, tax, and banking information for this business.
- Manage vendor requests to link to this business for payments.

**I am Authorized to Register this Business**

I prefer to notify the authorized agent to manage this business entity. The authorized agent will:

- Maintain, and keep current, the address, tax, and banking information for this business.
- Manage vendor requests to link to this business for payments.

**Notify the Authorized Agent for this Business**

[Previous](#)

**Note:** If you choose to notify someone, that person will be invited to the system to finish setting up the business account as the Authorized Agent. Review the **Notifying an Authorized Agent** section of this job aid for more information on this process.

**Step 11**

In the W9 Information section, enter the appropriate name, TIN, federal tax classification, and contact address—including city, state, zip code, and country—in the corresponding fields.

**3 W9 Information**

Name (as shown on your income tax return)  
David D Attorney

Doing Business As Name (DBA) (OPTIONAL)

**Tax Identification Number (TIN)**

Employer Identification Number (EIN)  
xx-xxxxxx

Confirm EIN  
xx-xxxxxx

Federal Tax Classification  
2 - C Corporation

☐ Use my contact address

Address (This is where IRS-1099 forms will be sent, if applicable.)  
123 Firm San Antonio

Apt/Ste # (OPTIONAL)

City  
San Antonio

State (U.S. Only)  
TEXAS

Zip/Postal Code  
78245

Country  
UNITED STATES

Read the two withholding statements and click the appropriate radio button. Finally, read and confirm the TIN Matching Notice, and then click **Save and Continue**.

**Certification**

☒ 1. The number shown on this form is my correct taxpayer identification number.  
2. I am a U.S. citizen or other U.S. person.

☒ I am not subject to backup withholding [more details](#)

☐ I am subject to backup withholding [more details](#)

☒ **TIN Matching Notice:** By clicking 'Save and Continue', you consent to IRS TIN matching. After successfully matching TIN and Name with IRS records, no changes can be made to the TIN for this payment account.

[Previous](#) [Save and Continue](#)

## Step 12

Click a radio button to indicate if you are using a checking or savings account. Enter your bank routing and account numbers in the corresponding fields, reentering the account number to confirm. Click **Save and Continue**.

**4 Bank Information**

☒ Checking Account ☐ Savings Account

Routing Number: 123456789 Account Number: \*\*\*\*\* Re-enter Account Number: \*\*\*\*\*

Fake Bank

Nickname for this account: [optional](#)

[Previous](#) [Save and Continue](#)

## Step 13

Confirm that the information you entered is correct, and then click **Confirm**.

**5 Review**

Before selecting 'Confirm', please verify your information is correct.

**Contact Info**

**David D Attorney**  
123 San Antonio  
San Antonio, TX 78229  
davidattorney210-a@gmail.com  
(555) 555-5555

**Tax and Payment Info**

**David D Attorney**  
123 Associate Firm San Antonio  
San Antonio, TX 78245

TIN (EIN): ••••••60  
Authorized Agent: David Attorney

Electronic payments will be sent to:  
Fake Bank  
Routing Number: 123456789, Fake Bank  
Account Number: ••••••

[Previous](#) [Confirm](#)



**Step 14**

A New Payment Account Added! success message appears. Click **Ok**. To add another payment account for a business entity, click **Add New Payment Account**, or click **Sign out** to exit the VMS.

The screenshot shows the Vendor Manager System interface. At the top, there is a blue header with the United States Courts logo and the text "Vendor Manager System". A success message box is displayed, stating "New Payment Account Added! Account is active and ready to receive payments. You may sign out." with an "Ok" button. To the right of the message is a "Sign out" button. Below the header, the "Contact Information" section displays details for David Attorney, including address, email, and phone number. An "Edit Contact Info" button is next to this section. Below that, the "My Payment Accounts" section shows a list of accounts, with a "+ Add New Payment Account" button. A red arrow points to this button. Another red arrow points to the "Sign out" button in the top right corner.

**Note:** To view the process for adding a new payment account with an SSN, please review the Vendor Manager System using SSN job aid.

## Notifying an Authorized Agent

If you select the option to notify the Authorized Agent to set up and manage the payment account for the business, you will be required to enter the business name, name of authorized agent, and email address of the authorized agent.

**Step 1**

Click **Notify the Authorized Agent for this Business**.

The screenshot shows a "No Matches Found" message with a warning icon. The text reads: "A business entity must be registered with Vendor Manager to receive payments and IRS 1099 forms, if applicable. Are you authorized to register and manage this business entity?". Below this, there are two light blue boxes. The left box is titled "By registering this business entity, I agree to:" and lists two bullet points: "Maintain, and keep current, the address, tax, and banking information for this business." and "Manage vendor requests to link to this business for payments." Below the list is a button labeled "I am Authorized to Register this Business". The right box is titled "I prefer to notify the authorized agent to manage this business entity. The authorized agent will:" and lists the same two bullet points. Below the list is a button labeled "Notify the Authorized Agent for this Business". A red arrow points to this button. At the bottom center, there is a "Previous" button.

**Step 2**

Enter the business name, authorized agent name, email address and re-enter the email address to confirm, then select the certify authorized agent checkbox, and click **Send Invite**.

**Add New Payment Account** Cancel

1 U.S. or Foreign Entity

2 W9 Information

Notify an **Authorized Agent** from this business who is responsible for registering this EIN (\*\*\*\*\*70) as a new vendor. When you complete your registration, an email invitation will be sent to the proposed authorized agent listed below to register the business. You will be notified when the business is registered and approved for use a payment account.

Please provide contact information for the Authorized Agent for this business:

Business Name

Name of Authorized Agent

Email Address

Confirm Email Address

☒ I am checking the box you certify that **Anthony Agent** (AttorneyFirm@gmail.com) is the authorized agent of EIN: \*\*\*\*\*70 and can make changes to the business information including but not limited to changing direct payment information, business address, business employees, and authorized agents.

Previous Send Invite

**Step 3**

An email is sent to the email address you entered above and a New Payment Account Requested! success message displays. Click **Ok**.

**New Payment Account Requested!**

You will receive an email when this account has been set up by the Authorized Agent.

Ok

**Step 4**

On your homepage you will now see your requested payment account is pending approval from the authorized agent. Check your email for the approval email from the authorized agent.

**David D Attorney**  
TIN (EIN): \*\*\*\*-\*\*\*\*\*60  
Authorized Agent: David Attorney

Pending Approval

**Step 5**

Once the Authorized Agent approves the payment account, you will receive an email that your request has been approved. Sign in to the VMS, the payment account is now pending confirmation. Select the acknowledgement checkbox and confirm the account.

The screenshot shows a 'Pending Confirmation' screen for 'Attorney Firm'. The firm's TIN (EIN) is 00-0000070. The address is 123 Associate Firm San Antonio, San Antonio, TX 78245. The Authorized Agent is Anthony Agent, 123 Associate Firm San Antonio, San Antonio, TX 78245, with email anthonyagent@gmail.com and phone (210) 555-5555. Electronic payments will be sent to Fake Bank, with Routing Number 123456789 and Account Number 000000095. A checkbox is checked, indicating acknowledgement that EFT payments from the U.S. Courts will be made to the bank account for, and reported to the IRS as income to, Attorney Firm, managed by Anthony Agent. At the bottom, there are 'Decline' and 'Confirm Account' buttons. A red arrow points to the 'Confirm Account' button.

**Step 6**

You will see a confirmed notification and you can now use this payment account.

The screenshot shows a 'Confirmed' notification screen. A red arrow points to the 'Confirmed' status. The Authorized Agent information is repeated: Anthony Agent, 123 Associate Firm San Antonio, San Antonio, TX 78245, anthonyagent@gmail.com, (210) 555-5555.

To add another payment account for another business entity using an EIN or using an SSN, click **Add New Payment Account** or to exit click **Sign out**.

The screenshot shows the 'Vendor Manager' dashboard. The header includes the United States Courts logo and the text 'Vendor Manager Manage your contact, business, and account information.' A red arrow points to the 'Sign out' link. The 'Contact Information' section shows David D Attorney, 123 San Antonio, San Antonio, TX 78229, davidattorney210+a@gmail.com, (555) 555-5555, with an 'Edit Contact Info' button. The 'My Payment Accounts' section has a red box around the '+ Add New Payment Account' button.