

VENDOR DATA RECORD (VDR)

Student Guidance

These instructions are intended to provide general guidance for our CSUEB Students. However, it is ultimately the responsibility of the student to read carefully all VDR form instructions to ensure the form is filled out correctly.

1. Be sure to complete all sections of the form which consists of 5 Parts. Required fields in the Adobe Sign workflow are indicated with an asterisk (*). Failure to do so will delay your payment.
2. Be accurate. As a reminder, this form is a legal document.
3. Still have questions? See our FAQs.

Part I Vendor Business and Contact Information		
1	Vendor Name	Enter your full legal name.
2	Doing Business As (DBA)	Leave blank.
3	Address	Enter your street address, including Apt #, Suite #, Unit #, etc.
4	Address	Enter your City, State, and Zip Code.
5	Phone Number	Enter your phone number
6	Fax Number	Leave blank.
7	Sales Personnel	Leave blank.
8	Sales Personnel Email	Leave blank.
9	Accounts Receivable Personnel	Leave blank.
10	Accounts Receivable Personnel Email	Leave blank.
11	Accepted Payment Methods	Select either ACH or Check. Note that ACH (or Direct Deposit) payments will go directly to your bank account and is the preferred payment method. If you do not already have your Direct Deposit set up with the University, then use your horizon email account to email accounts.payable@csueastbay.edu and request to be set up on direct deposit.
12	Discount Offered for Prompt Payment?	Leave blank.

Part II Entity and Certification		
1	Check appropriate federal tax classification	Select Individual/Sole Proprietor or single-member LLC.
2	Check appropriate box which best describes your primary business with CSU East Bay	Check the reason you are receiving a payment from the University.
3	Certification	Leave blank.

Part III Taxpayer Identification Number (TIN)		
	Federal Employer Identification Number	Leave blank.
	Social Security Number	Enter your social security number.

Part IV Vendor Residency Declaration **IMPORTANT** You must answer both 1 and 2.		
1	California State Tax Withholding Status	<input type="checkbox"/> "California Resident"- check if you are a California resident. Or <input type="checkbox"/> "California non-Resident" - check if you are not a California resident, then select below if applicable: <input type="checkbox"/> "A waiver of CA state tax withholding from the California Franchise tax Board" - check if requesting a waiver from CA State tax withholding and provide Franchise Tax Board Form 587 or 590. Otherwise leave blank. <input type="checkbox"/> "All services related to the payment were performed outside of the state of California" - check if you rendered services in another state or country. Otherwise leave blank.
2	Federal Income Tax Withholding Status	Check one box: <input type="checkbox"/> Are you a US Citizen? <input type="checkbox"/> Are you a permanent resident alien and have a green card? <input type="checkbox"/> I am not a US citizen and I do not have a permanent resident alien green card. *If you check this box, enter the Country of your permanent residency. *If you know that you are tax exempt by tax treaty, check the box. Otherwise leave blank. *Expect an email from the University's Payroll department for further instructions.

Part V Certification		
	Name	Type your name.
	Date	Enter the date.
	Phone Number	Provide a phone number.
	Sign Here	Electronically sign the form using Adobe Sign.
	Title	If you are getting this payment because you are a student, type the word "Student"

Frequently Asked Questions

- **Why are you receiving a Vendor Data Record (VDR)?**
 - You are expecting to receive payment from the University. The VDR form is required for all payees (non-governmental entities or individuals) entering into a transaction that may lead to a payment from the University. The VDR form is a legal tax document in lieu of an IRS W-9 form. For more details about the W-9 form, please visit the IRS website at www.irs.gov.

- **Who (or what) is a Vendor?**
 - A Person (Individual) or Business anticipating a payment from the University in exchange for services or goods they provided to CSUEB.

- **What electronic device can I use to fill-out the form?**
 - We recommend using a desktop computer or laptop to fill-out the form in Adobe Sign. Please do not use auto-fill since we commonly see sections not fully completed.

- **What is a CA state tax withholding waiver?**
 - This is more applicable to businesses but you can visit the State of California Franchise Tax Board website to see if you qualify and for further instructions: <https://www.ftb.ca.gov/forms/misc/588-instructions.html>

- **What is the Country of Residency?**
 - The country of your citizenship or principal home for legal purposes.

- **Why am I receiving the VDR form a second time?**
 - VDR forms are sent out a second time when the first one is not filled out correctly. Please be sure to complete all 5 Parts of the form. Read the instructions carefully.

- **Still have questions?** Please see additional resources:
 - Read the second page of the VDR form that provides form directions and explanations.
 - Reach out to the Department contact for the CSUEB program who is issuing this payment for guidance.
 - Consult your tax preparer for any tax related questions.