

Vendor Manager System

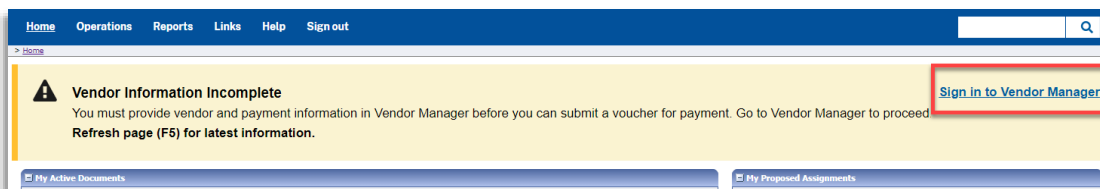
The Vendor Manager System (VMS) is a web-based application that is used to collect W9, electronic fund transfer (EFT) payment, and employee-business relationship information for CJA payees and business entities. Vendor information syncs with JIFMS and other tenants such as eVoucher, allowing a single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

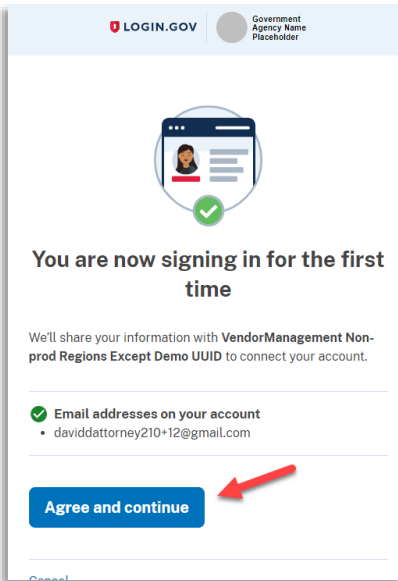
You are redirected to the Vendor Manager sign in page. Click **Sign in with LOGIN.GOV**.



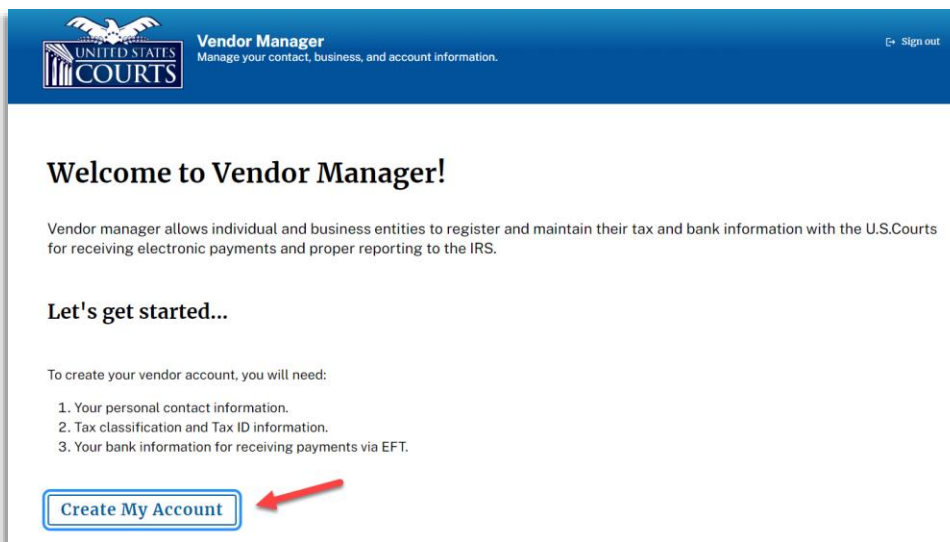
Note: Because you were already signed in to eVoucher, you aren't required to reverify your information in Login.gov. However, if for any reason you signed out of Login.gov or your authentication token expired (after 15 min.), you are required to sign in through Login.gov.

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 [Redacted] *Address is required			Apt/Ste # OPTIONAL
City [Redacted] *City is required	State (U.S. Only) -Select- *State is required	Zip/Postal Code [Redacted] *Zip/Postal Code is required	
Country UNITED STATES			
Phone [Redacted] *Phone number is required	Phone Type -Select- *Phone type is required	Primary ☐	
+ Add Additional Phone			
Email Address davidattorney210+12@gmail.com			
Save and Continue			

Step 6

Click **Save and Continue**.

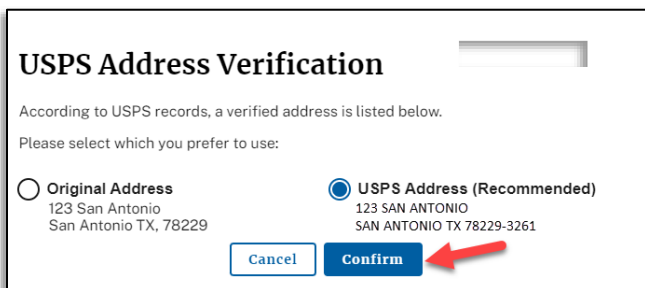
1 Contact Information

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:

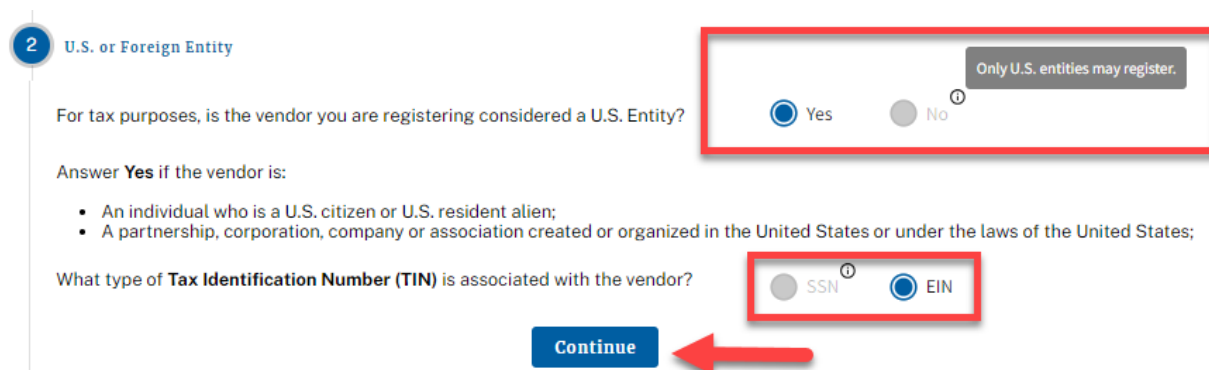
☐ **Original Address**
123 San Antonio
San Antonio TX, 78229

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

A red arrow points to the **Confirm** button.

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;

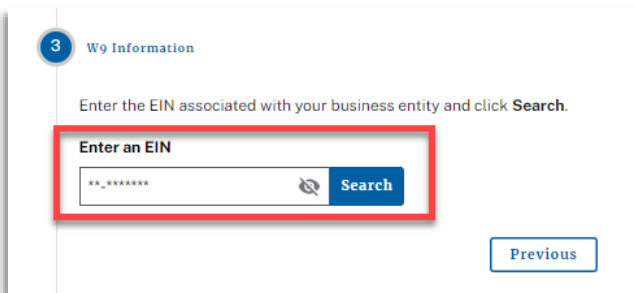
What type of **Tax Identification Number (TIN)** is associated with the vendor?

☐ SSN ☒ EIN

A red box highlights the **Yes** radio button and the **No** radio button (which is disabled). A tooltip above the **No** button reads "Only U.S. entities may register." Another red box highlights the **EIN** radio button. A red arrow points to the **Continue** button.

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

xx-xxxxxx

A red box highlights the "Enter an EIN" input field and the **Search** button.

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.

2 W9 Information

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

Enter an EIN

***** **Search**

✓ **We found an existing EIN.**
Please verify that this is the correct business entity to receive payments.

David D Attorney
123 Associate Firm San Antonio
San Antonio, TX 78245
TIN (EIN): ••••••60

Authorized Agent Contact Info:
David Attorney
davidattorney210+zz@gmail.com
(210) 555-5555

☒ Use this business entity for payments. Upon submission, the system will notify the Authorized Agent of your request to use this business for payments.

Previous **Send Request**

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**.

UNITED STATES COURTS
Vendor Manager
Manage your contact and business and account information.

Link Request Sent!
You will receive an email when approved to use this payment account. **Ok**

Contact Information

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

My Payment Accounts

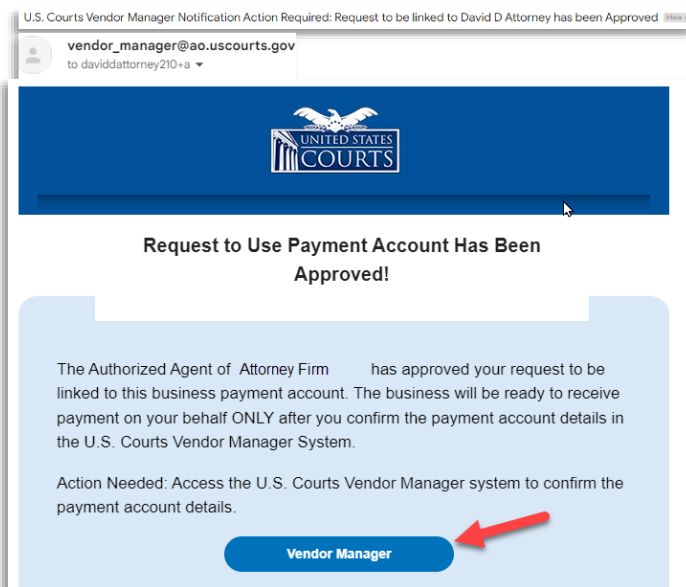
New Payment Acct
TIN (EIN): ••••••50
123 San Antonio
San Antonio, TX 78229
Electronic payments will be sent to:
Payment info needed

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

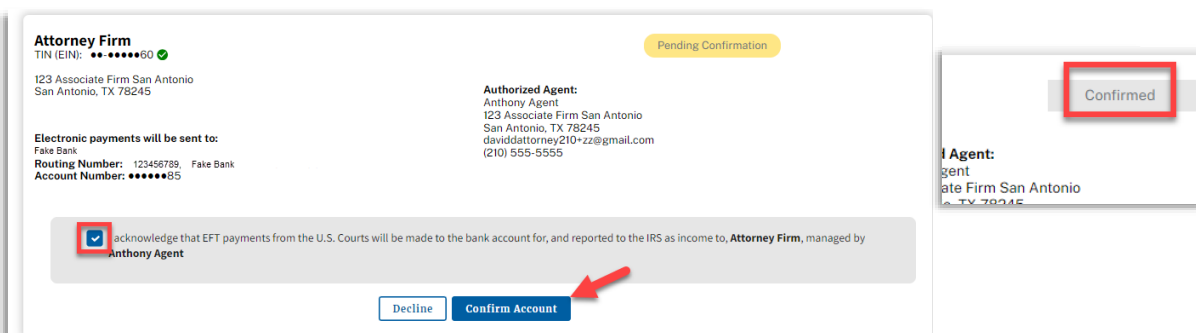
Note: To add another payment account using another EIN or SSN, click **Add New Payment Account**. Review the **Authorized Agent** job aid to learn more about the process for approving a pending payment account. To view the process for adding a new payment account an SSN, review the **Vendor Manager System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

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.

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, a blue banner displays the United States Courts logo and a success message: "New Payment Account Added! Account is active and ready to receive payments. You may sign out." Below the message is an "Ok" button. To the right of the message is a "Sign out" link with a red arrow pointing to it. Below the banner, the "Contact Information" section displays details for David Attorney, including address, email, and phone number. To the right of this section is an "Edit Contact Info" button with a red arrow pointing to it. Below the contact information is the "My Payment Accounts" section, which shows a list of accounts for David D Attorney. Below the list is a "+ Add New Payment Account" button with a red arrow pointing to it. At the bottom of the list is a "More" button.

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 message states: "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 the message are two options. The first option is "By registering this business entity, I agree to:" followed by a list of responsibilities: "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 this list is a button labeled "I am Authorized to Register this Business". The second option is "I prefer to notify the authorized agent to manage this business entity. The authorized agent will:" followed by a list of responsibilities: "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 this list is a button labeled "Notify the Authorized Agent for this Business" with a red arrow pointing to it. At the bottom of the screen 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 the 'Attorney Firm' profile page in the VMS. The status is 'Pending Confirmation'. The firm's details include TIN (EIN): ●●●●●●70, address 123 Associate Firm San Antonio, San Antonio, TX 78245, and contact information for Anthony Agent. Electronic payment details for 'Fake Bank' are listed: Routing Number 123456789 and Account Number ●●●●●●95. A confirmation checkbox is checked, with the text 'I acknowledge 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 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 box. A red arrow points to the 'Confirmed' label. Below the notification, the contact information for Anthony Agent is displayed: 123 Associate Firm San Antonio, San Antonio, TX 78245, anthonyagent@gmail.com, and (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 displays details for David D Attorney: 123 San Antonio, San Antonio, TX 78229, davidattorney210+a@gmail.com, and (555) 555-5555. An 'Edit Contact Info' button is next to the contact details. The 'My Payment Accounts' section at the bottom has a red box around the '+ Add New Payment Account' button.