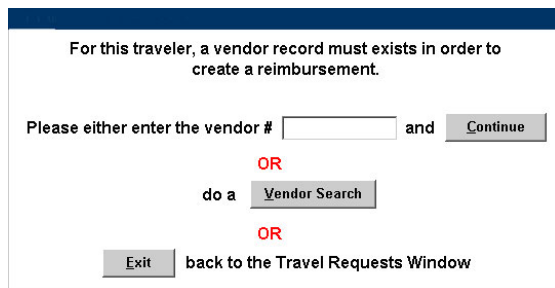


## Vendor Selection Instructions

In order to prevent error in vendor selection, please follow these steps:

1. Upon receipt of the documentation for a reimbursement, the Initiator must verify whether the Traveler (Guest/Student) has a valid Vendor Record (ID) in the Financials System in order for the reimbursement to be processed (see image below of pop-up window that permits Initiator to verify Vendor Record existence).

**Note:** All OSU-employed Travelers should exist within the Financials System's Vendor database from HR and this pop-up window will not appear, as long as the Employee radio button was selected at the Travel Order entry in association with a valid Employee ID.



The screenshot shows a pop-up window with a dark blue header. The main text reads: "For this traveler, a vendor record must exist in order to create a reimbursement." Below this, there are three options: 1. "Please either enter the vendor # [input field] and [Continue] button". 2. "OR" in red text, followed by "do a [Vendor Search] button". 3. "OR" in red text, followed by "[Exit] button back to the Travel Requests Window".

2. If upon completing a Vendor Search, you find a similar Vendor Record for your Traveler, verify all of the following first before selecting:
  - Full Name (be careful with common names)
  - Address (does this match your records?)
  - Employee ID (this column will be populated if the Traveler you are searching for is an OSU employee)

**Note:** Don't select a vendor unless you are certain that it matches the Traveler you intend to reimburse. For further clarification, feel free to contact Travel Office.

3. If while executing a Vendor Search you determine that the Guest/Student Traveler does not have a Vendor record, you will need to Exit out of the Vendor Search window, thus suspending the creation of the traveler's reimbursement within the Travel System. Then you will need to complete a Vendor Maintenance Form to request the addition of that individual to the Financials System Vendor database.
4. Go to the Purchasing Website at <http://purchasing.osu.edu/Vendors/index.asp> and complete the form as prompted for an Individual entry. Be sure to complete and submit the required AP Compliance Form along with your request. You will be notified by Accounts Payable when the new vendor has been set up in the system. Once you are notified, you may re-start the initiation of the traveler's reimbursement within the Travel System.