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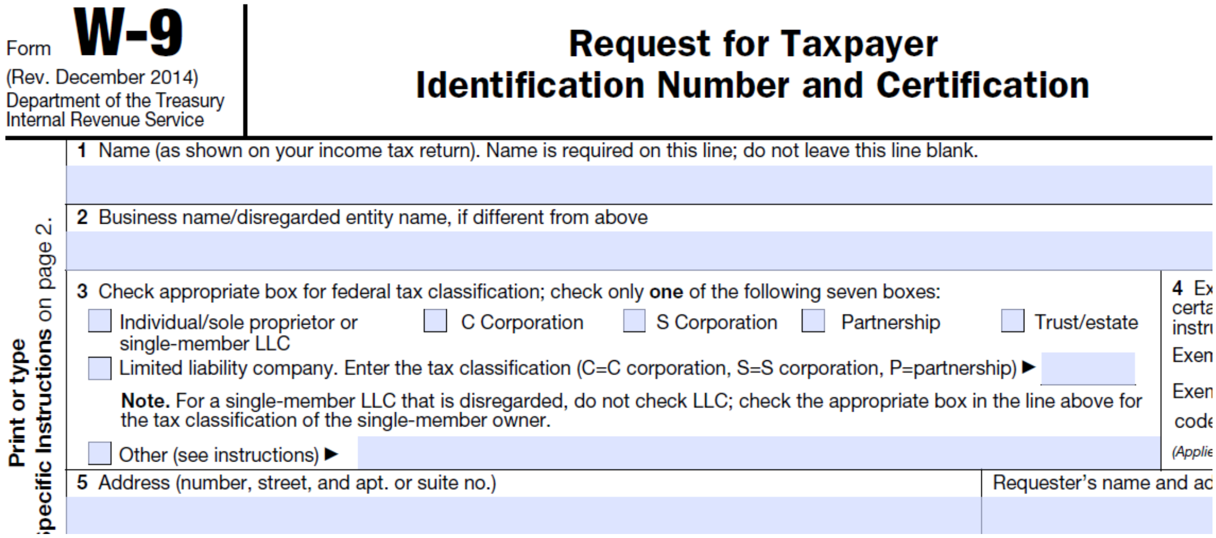
Changing your W9/1099 Classification

Your W9/1099 classification is found on your W9, in Section 3. It is your “federal tax classification”.


Form **W-9**
(Rev. December 2014)
Department of the Treasury
Internal Revenue Service

Request for Taxpayer Identification Number and Certification

Print or type
Specific Instructions on page 2.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.

2 Business name/disregarded entity name, if different from above

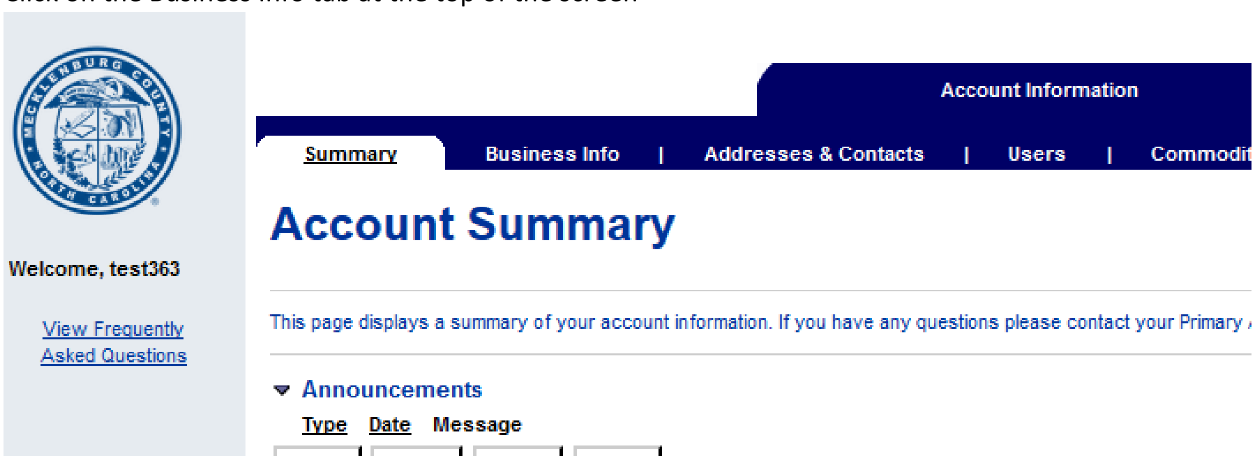
3 Check appropriate box for federal tax classification; check only **one** of the following seven boxes:
☐ Individual/sole proprietor or single-member LLC ☐ C Corporation ☐ S Corporation ☐ Partnership ☐ Trust/estate
☐ Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=partnership) ▶
Note. For a single-member LLC that is disregarded, do not check LLC; check the appropriate box in the line above for the tax classification of the single-member owner.
☐ Other (see instructions) ▶

4 Ex certa instru Exen Exen code (Applie

5 Address (number, street, and apt. or suite no.) | Requester’s name and ac

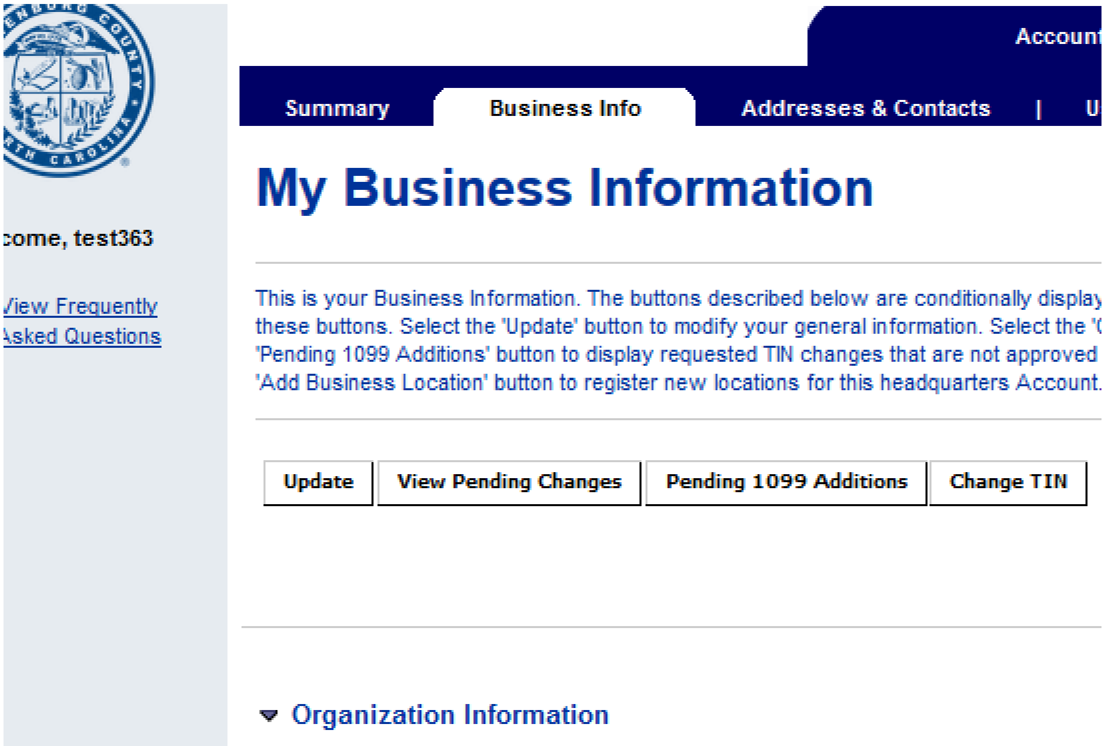
Your classification in MECKProcure must match this information. Should it change from when your company registered with Mecklenburg County, please do the following:

1. Login to https://www.meckprocure.com
2. Click on the Business Info tab at the top of the screen

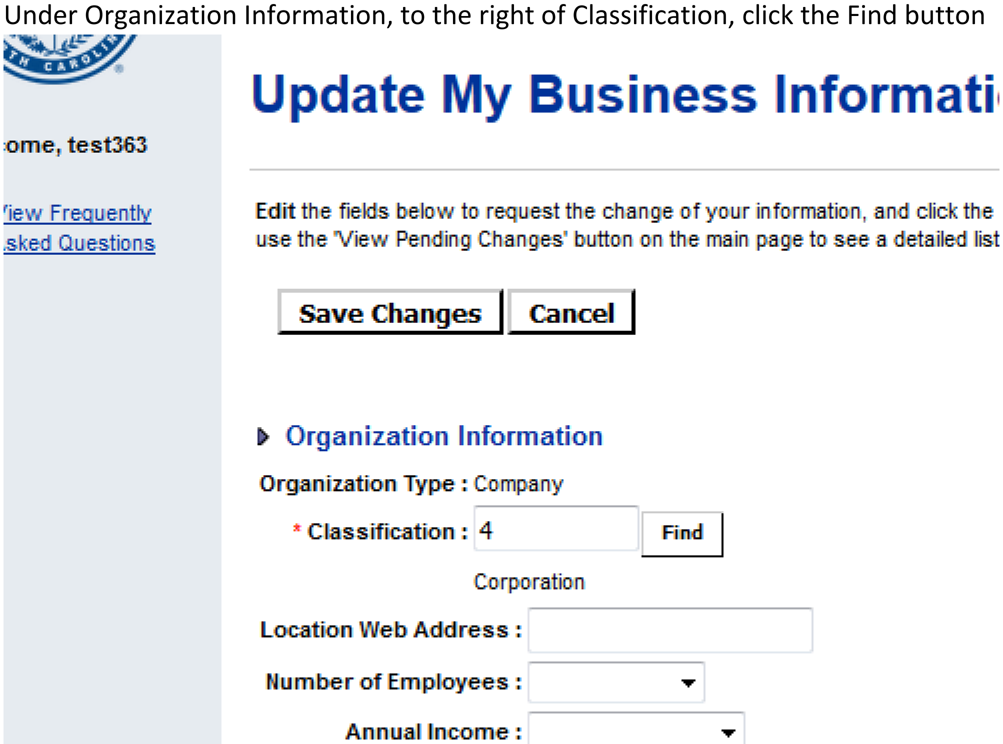


3. Click the Update button

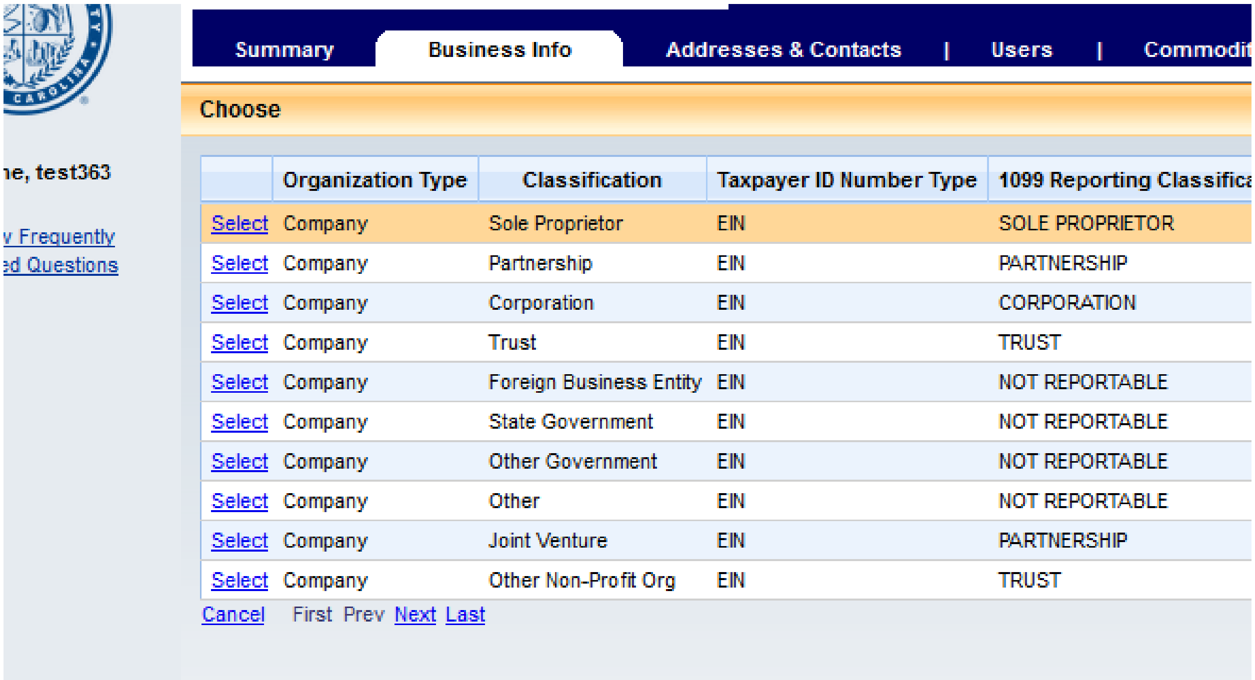
While updating Business Information, DO NOT put information in the discounts section. Doing so may affect payments to your company



4. Under Organization Information, to the right of Classification, click the Find button

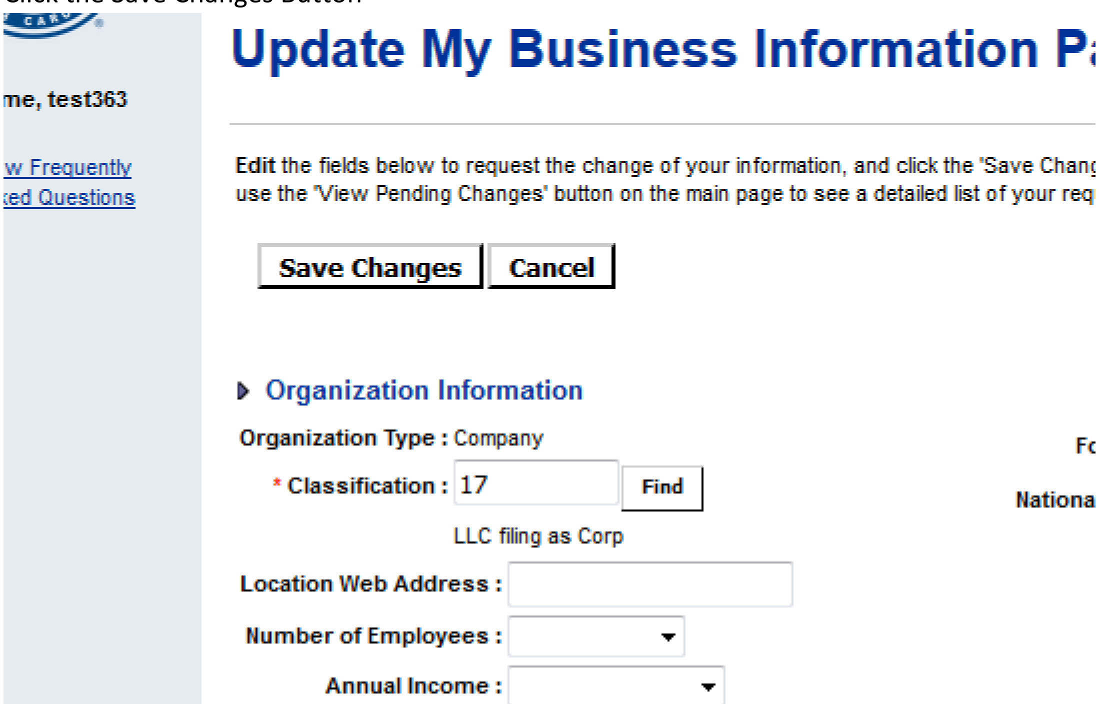


5. Find the appropriate classification and click the Select link to the left of the classification



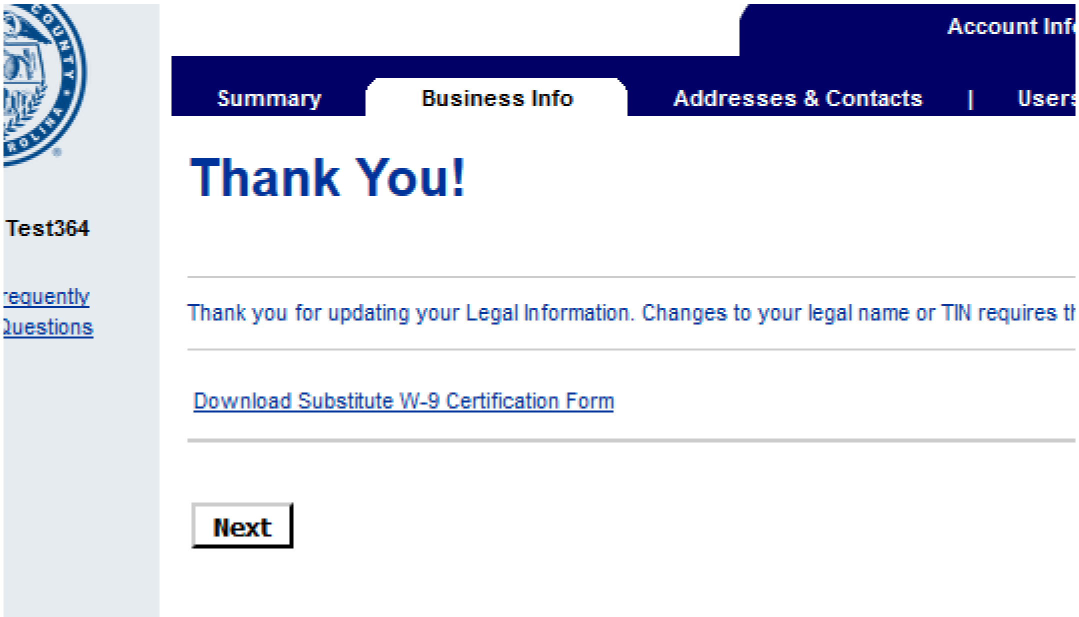
	Organization Type	Classification	Taxpayer ID Number Type	1099 Reporting Classifica
Select	Company	Sole Proprietor	EIN	SOLE PROPRIETOR
Select	Company	Partnership	EIN	PARTNERSHIP
Select	Company	Corporation	EIN	CORPORATION
Select	Company	Trust	EIN	TRUST
Select	Company	Foreign Business Entity	EIN	NOT REPORTABLE
Select	Company	State Government	EIN	NOT REPORTABLE
Select	Company	Other Government	EIN	NOT REPORTABLE
Select	Company	Other	EIN	NOT REPORTABLE
Select	Company	Joint Venture	EIN	PARTNERSHIP
Select	Company	Other Non-Profit Org	EIN	TRUST

6. Click the Save Changes Button



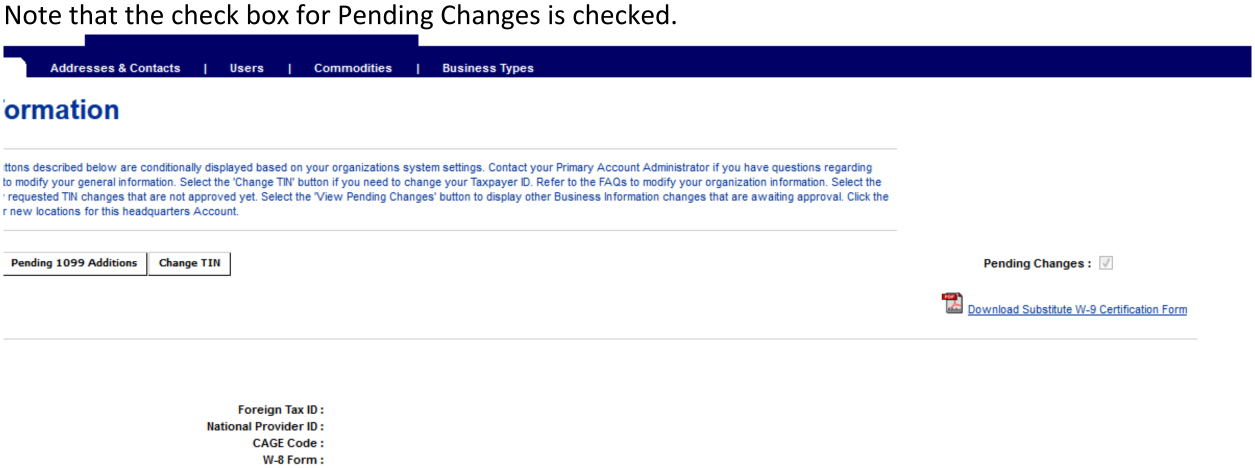
Edited by Karl Beil and Martha Fuller 7/14/2016

7. You will get



8. Click the "Download Substitute W-9 Certification Form link. This will open a W9 as a PDF with the changes you made.
9. Print the W9
10. Have it signed and dated by an authorized representative of your company.
11. Email or fax the W9 to Vendor.Management@MecklenburgCountyNC.gov , Fax 877-280-9020
12. Back in MECKProcure, click Next.

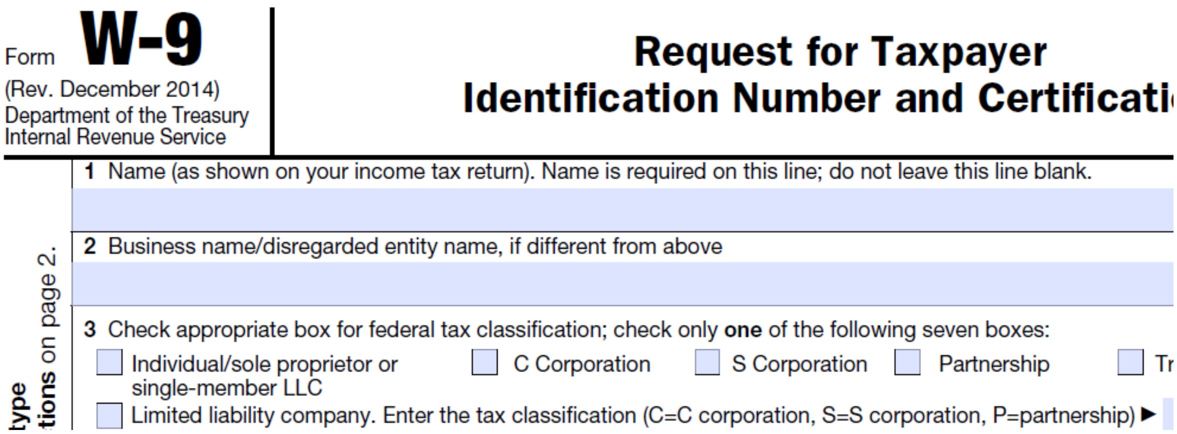
    Note that the check box for Pending Changes is checked.



This will stay checked till the changes have been approved by Mecklenburg County.

Changing the Legal Name of your company

The Legal Name of your company must match what is in Line 1 of your W9, “Name (as shown on your income tax return).”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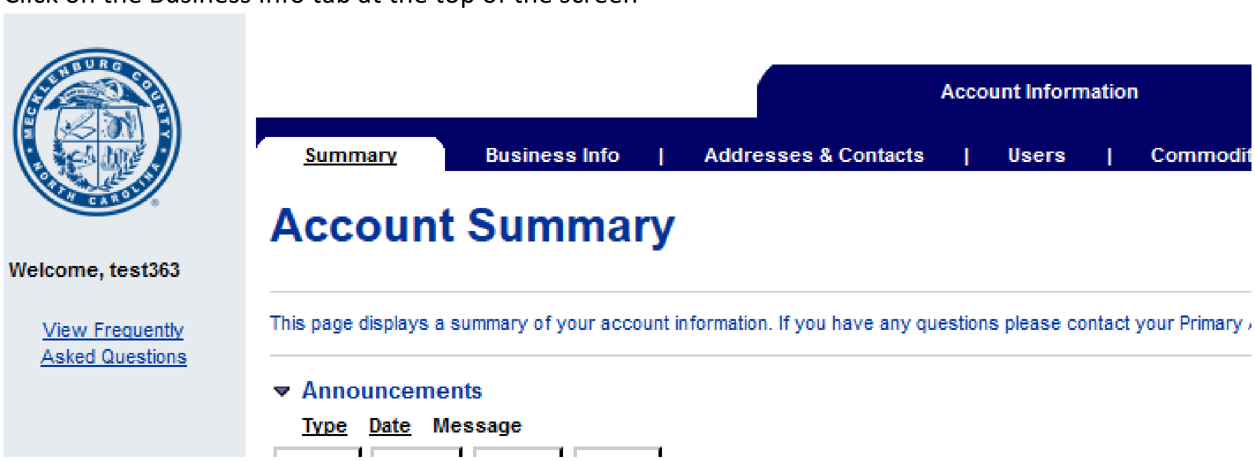
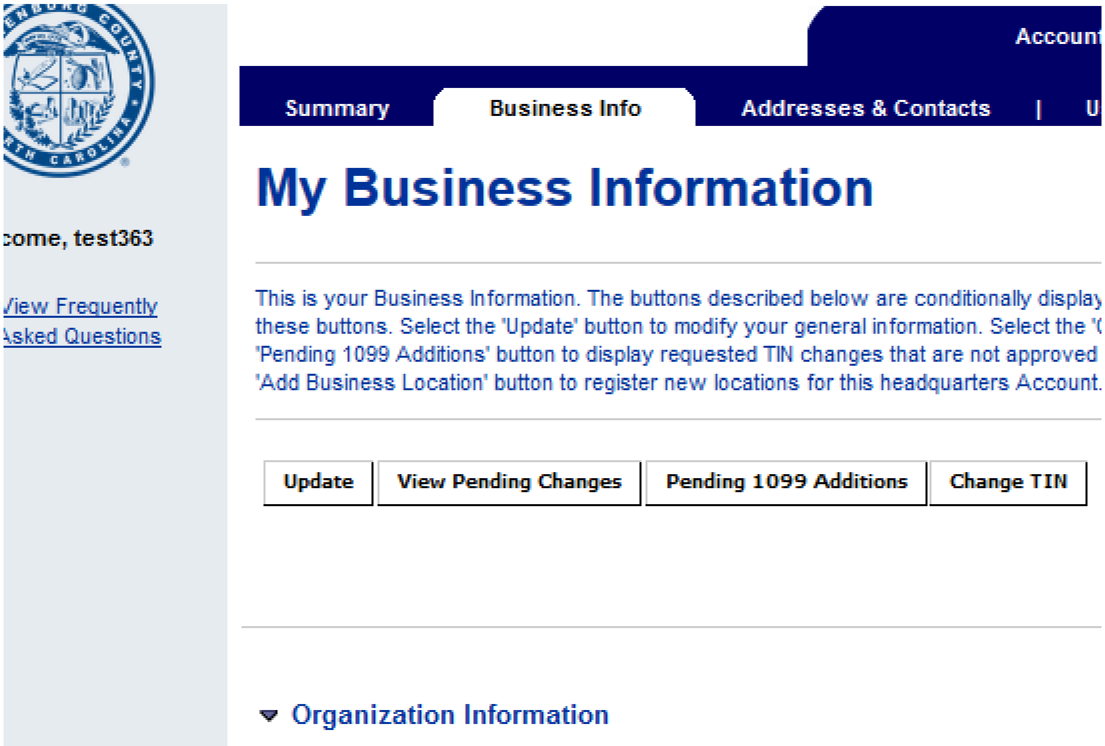
☐ Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=partnership) ▶

type
tions on page 2.

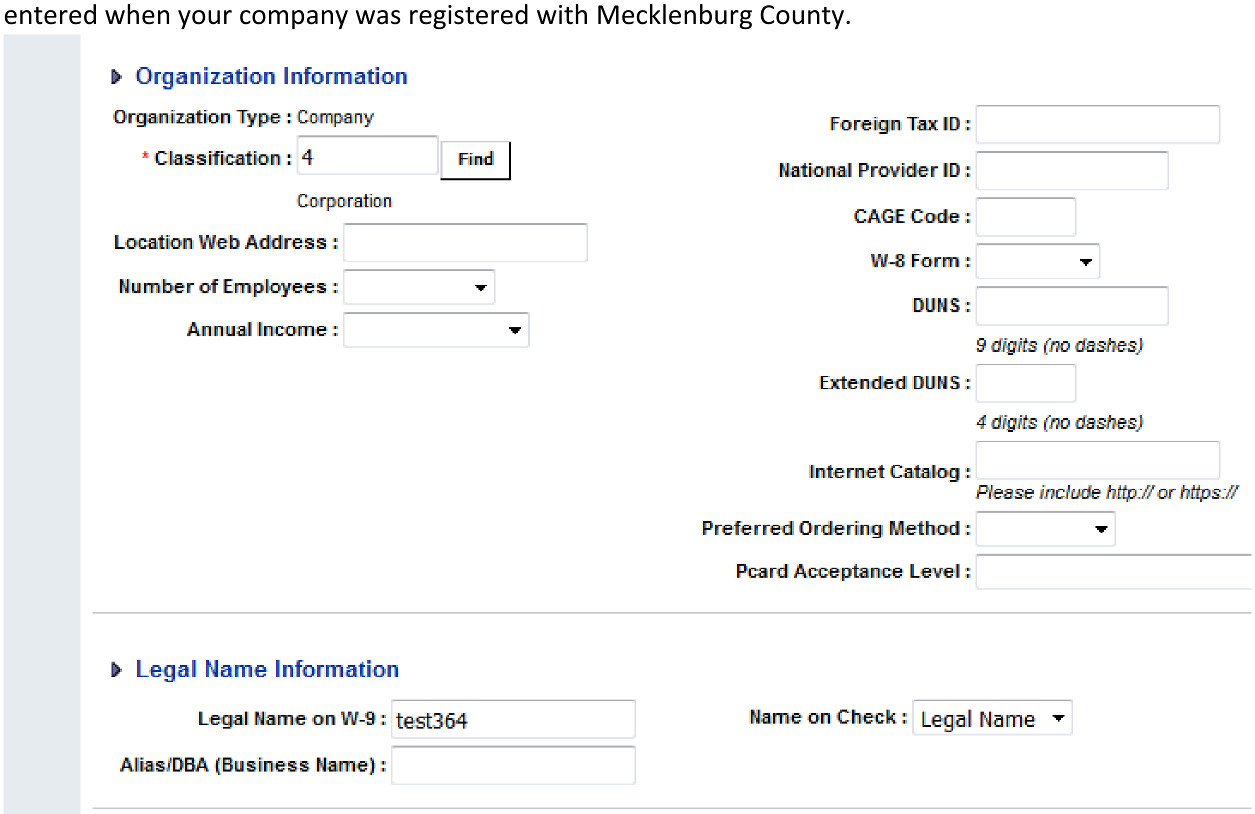
1. Login to https://www.meckprocure.com
2. Click on the Business Info tab at the top of the screen



3. Click the Update button

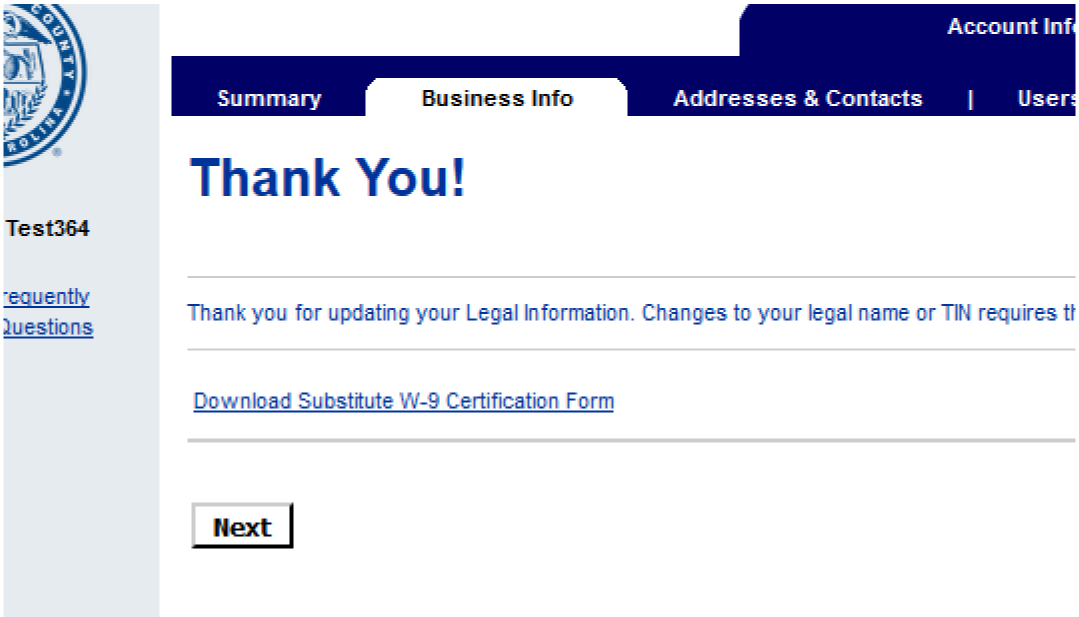


4. Under Legal Name Information, in the Legal Name On W-9 field, is the legal name that was entered when your company was registered with Mecklenburg County.



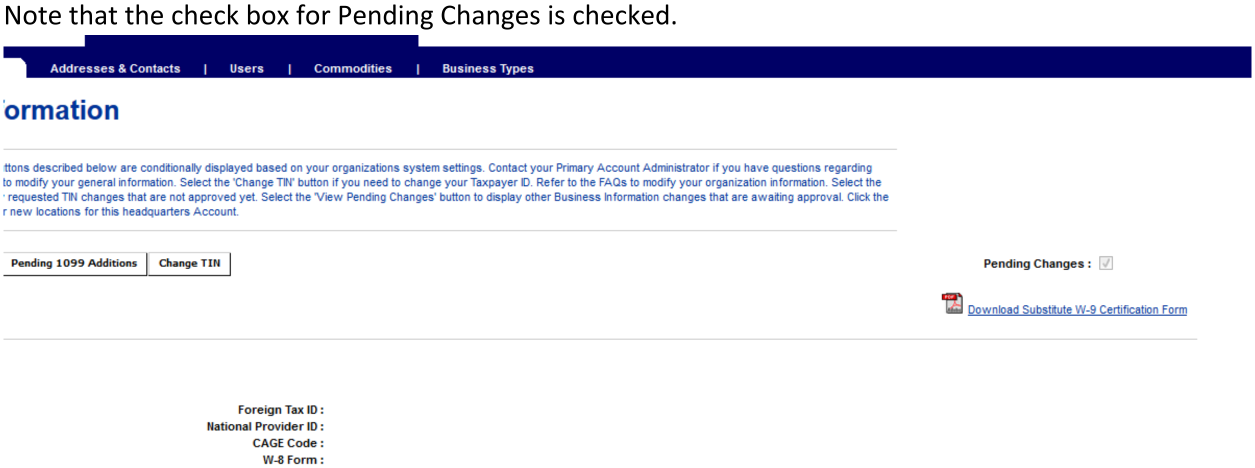
5. To change the Legal Name, delete what is there and type in what is on Line 1 of your W9.

6. Click the Save Changes Button
7. You will see



8. Click the "Download Substitute W-9 Certification Form link. This will open a W9 as a PDF with the changes you made.
9. Print the W9
10. Have it signed and dated by an authorized representative of your company.
11. Email or fax the W9 to Vendor.Management@MecklenburgCountyNC.gov , Fax 877-280-9020
12. Back in MECKProcure, click Next.

    Note that the check box for Pending Changes is checked.

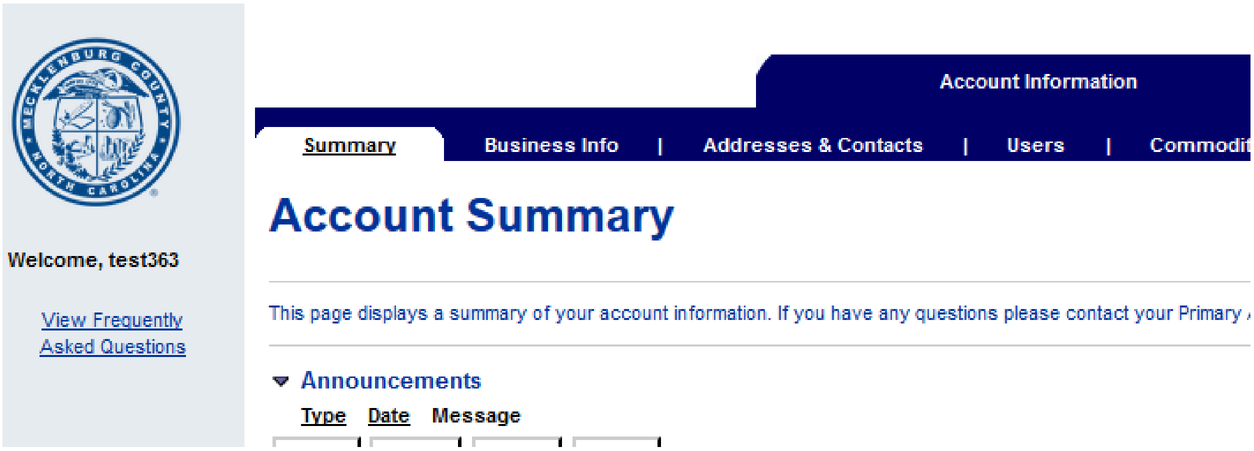


This will stay checked till the changes have been approved by Mecklenburg County.

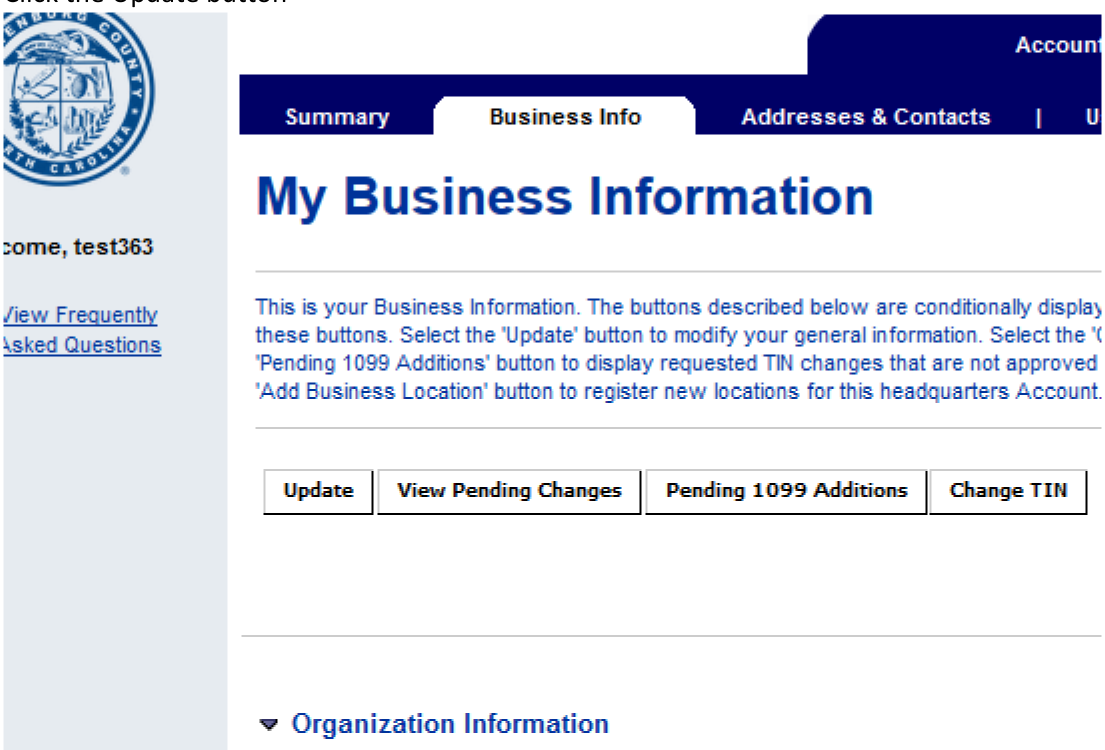
How to change your Legal Address

Your Legal Address is the address on your W9. This is the address the IRS has on file for your company for tax purposes. This is the address Mecklenburg County will send a 1099 to, if your company is 1099 reportable.

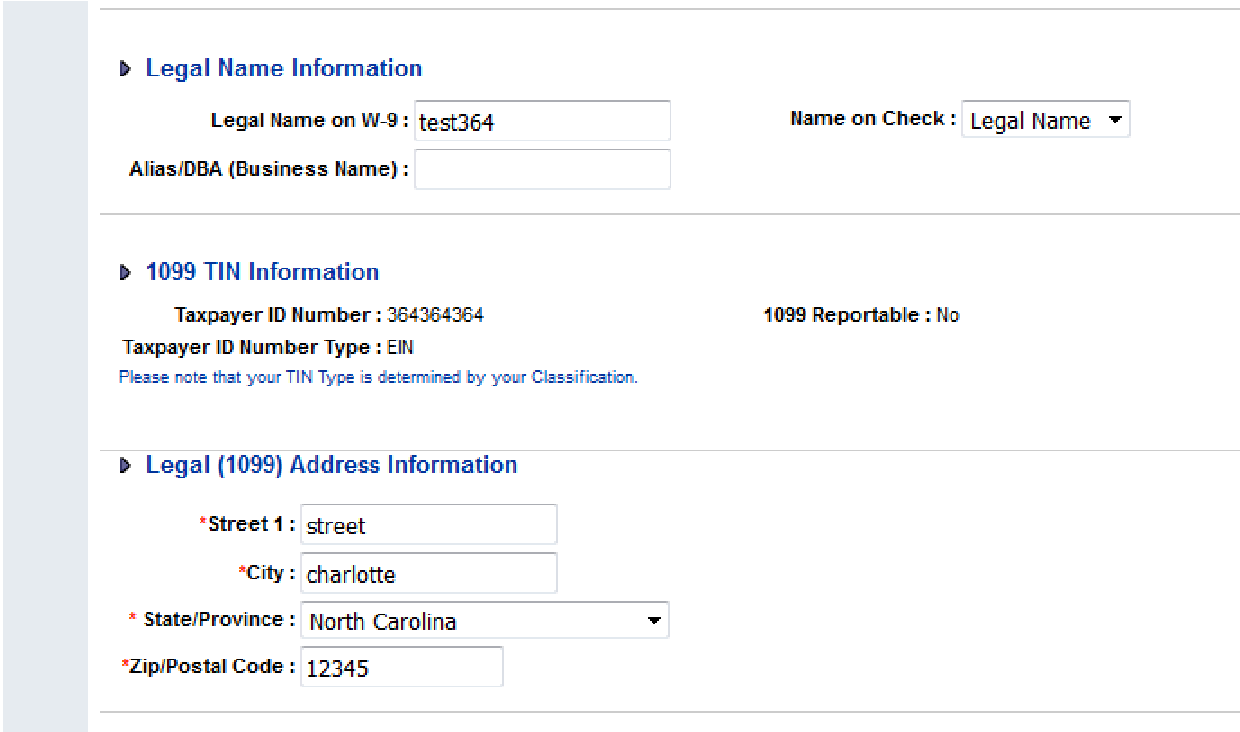
1. Login to https://www.meckprocure.com
2. Click on the Business Info tab at the top of the screen



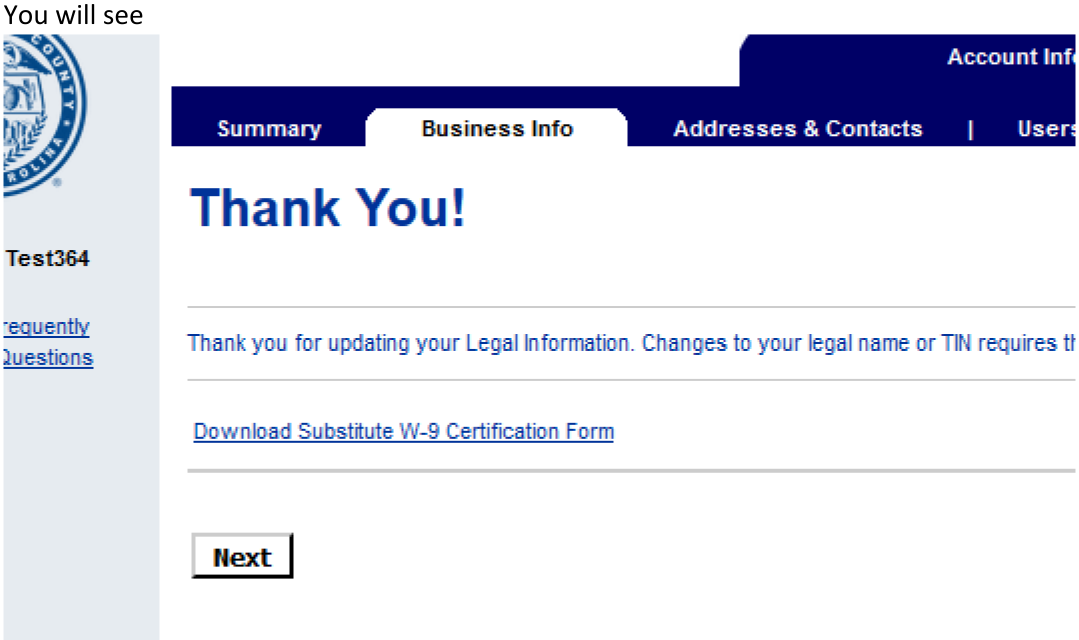
3. Click the Update button



4. Under Legal (1099) Address Information, make any required changes.



5. Click the Save Changes button.
6. You will see



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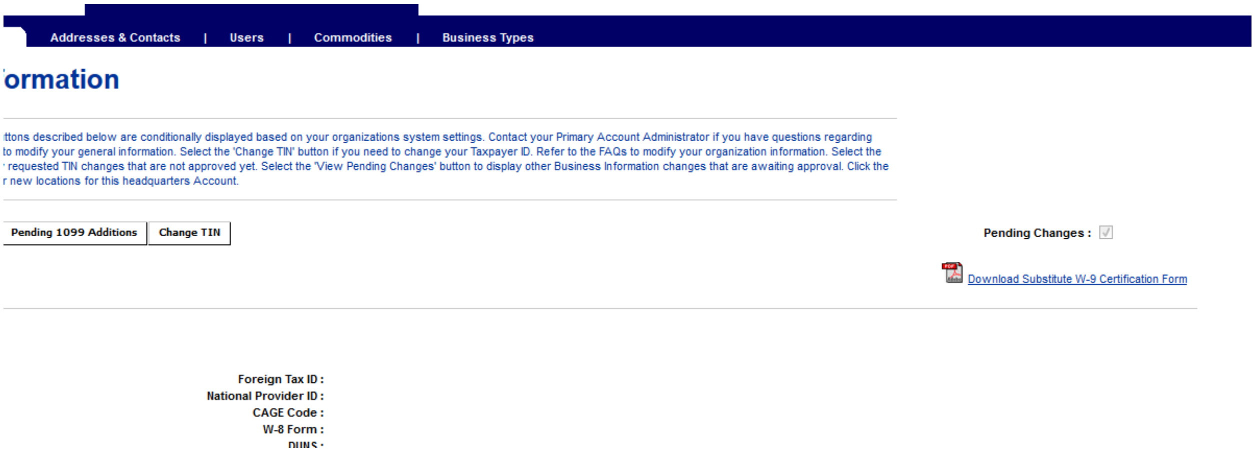


This will stay checked till the changes have been approved by Mecklenburg County.

How to add an Address

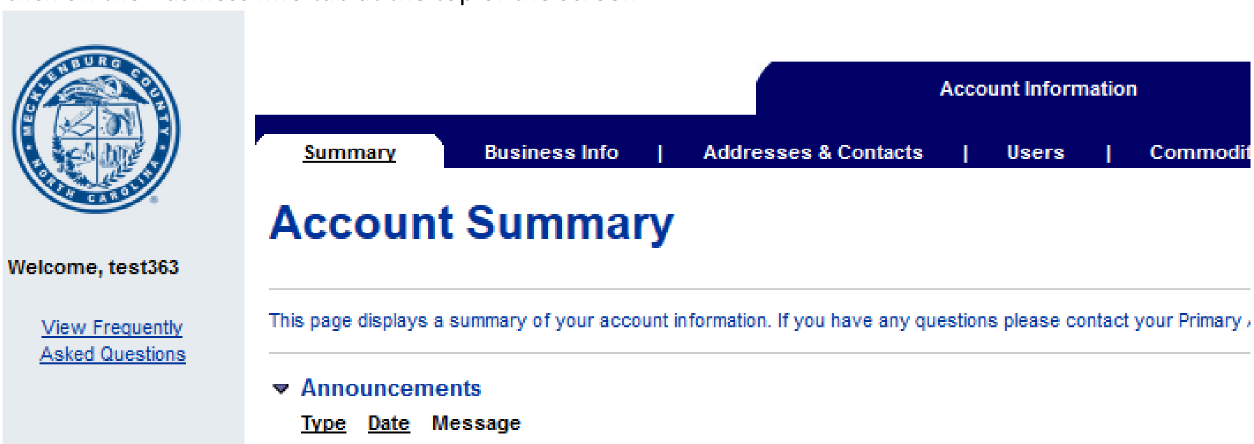
MECKProcure allows a company to have 4 types of address, not including the Legal Address:

1. Billing address – The address Mecklenburg County would send a bill/invoice to should the need arise.
2. Payment address – The remit address Mecklenburg County would send a check to should the EFT system fail.
3. Ordering address – The address Mecklenburg County would mail a purchase order to should we not be able to send it electronically.
4. Web Registrar – This address is created from the registration.

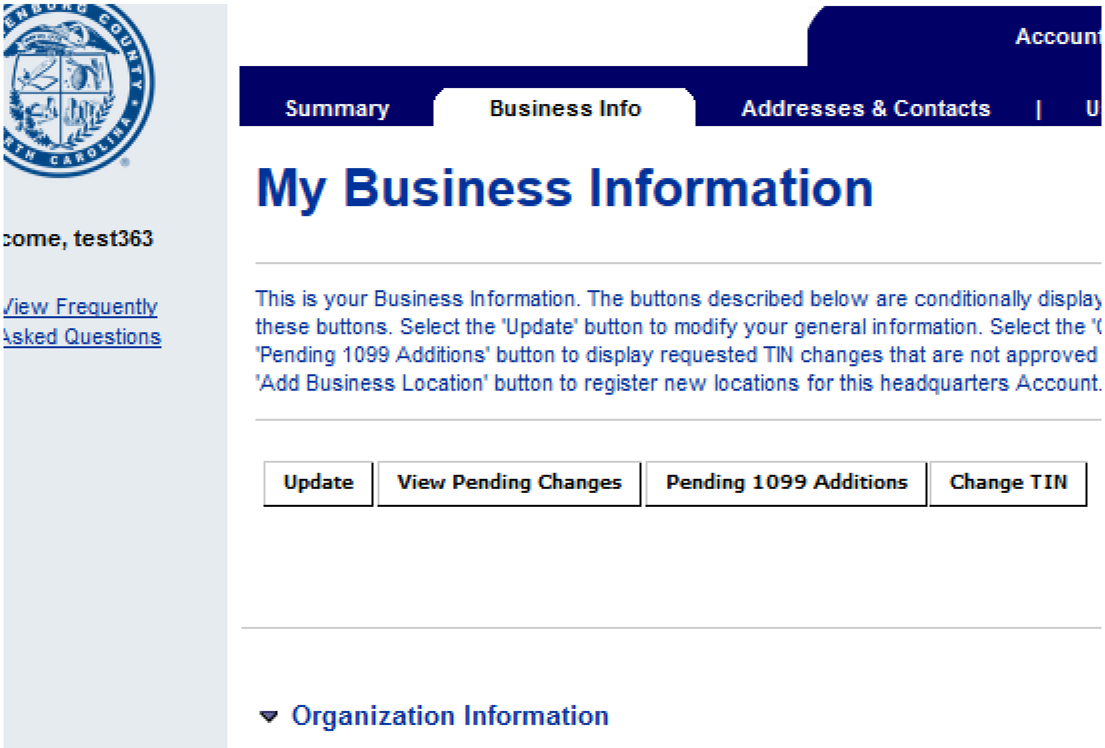
How to change your EFT information

Mecklenburg County policy is to pay vendors via EFT. Thus you are required to have EFT information in your account. If you need to change your Eft banking information, do the following:

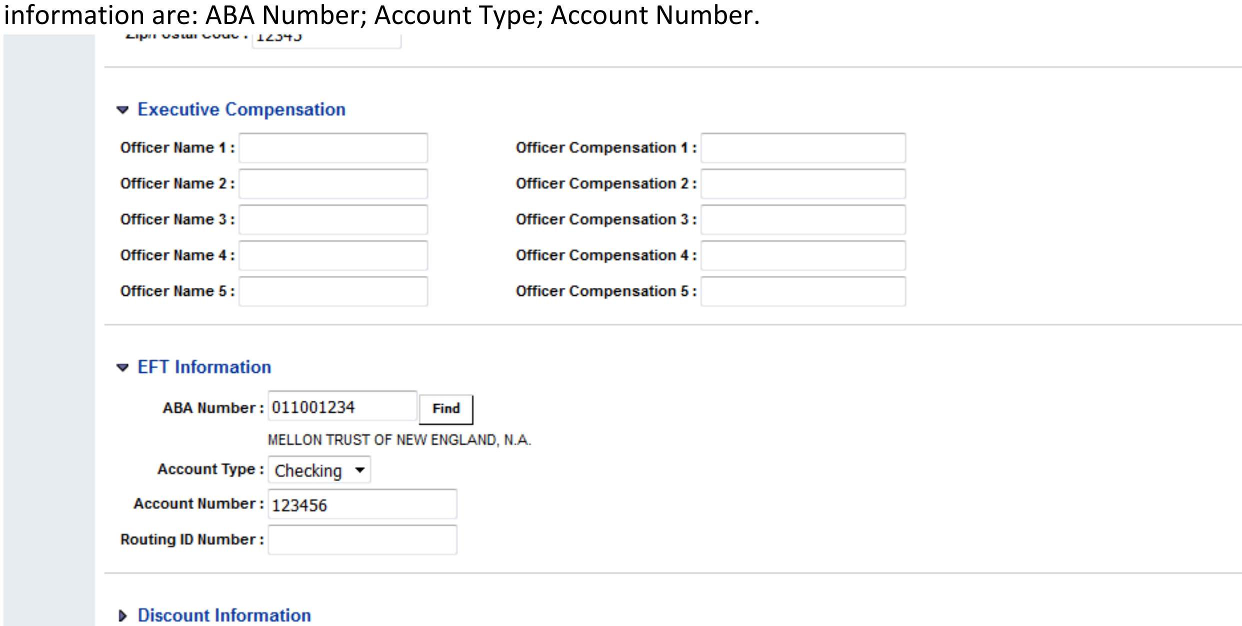
1. Login to https://www.meckprocure.com
2. Click on the Business Info tab at the top of the screen



3. Click the Update button

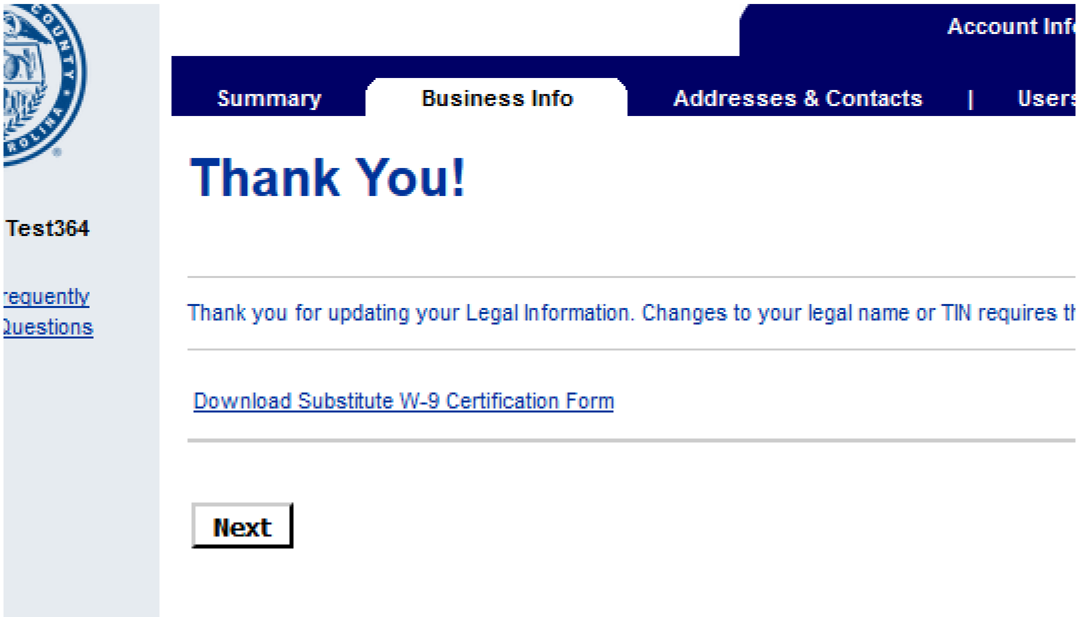


4. Under EFT Information, make any needed changes. Please note the fields that must have information are: ABA Number; Account Type; Account Number.

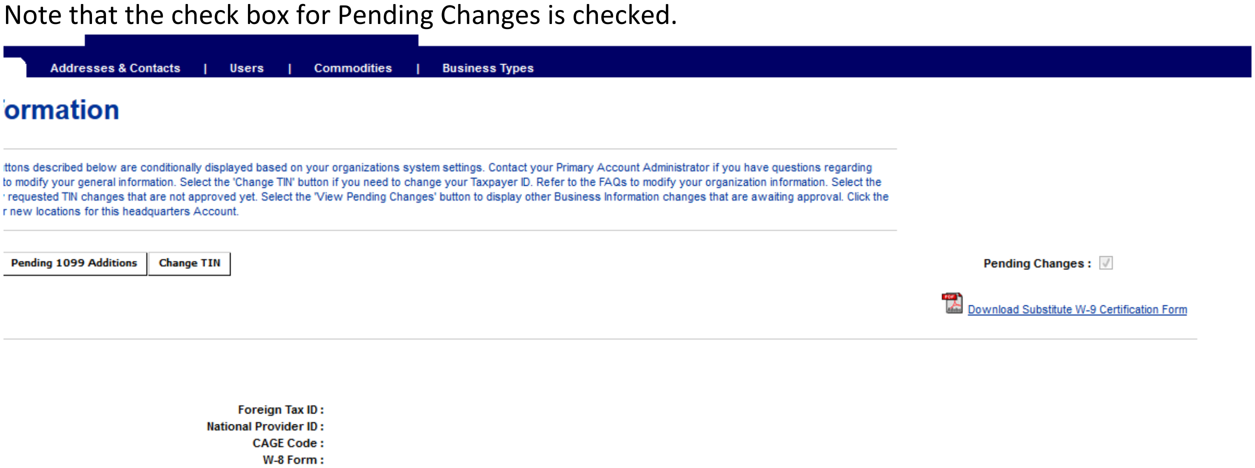


5. Click the Save Changes button.

6. You will see



7. Click the "Download Substitute W-9 Certification Form link. This will open a W9 as a PDF with the changes you made.
8. Print the W9
9. Have it signed and dated by an authorized representative of your company.
10. Print and complete the ACH-IAT forms that is available on the MECKProcure login page.
11. Email or fax the W9 and ACH-IAT forms to Vendor.Management@MecklenburgCountyNC.gov , Fax 877-280-9020
12. Back in MECKProcure, click Next.
    Note that the check box for Pending Changes is checked.



This will stay checked till the changes have been approved by Mecklenburg County.

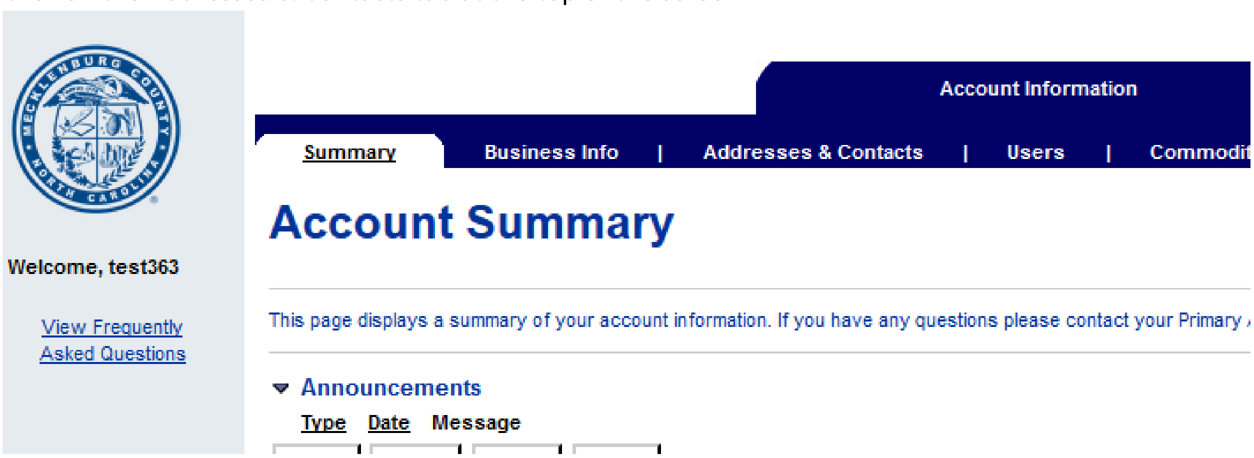
How to Change an Address and/or Contact

Your account can have up to four (4) different types of address:

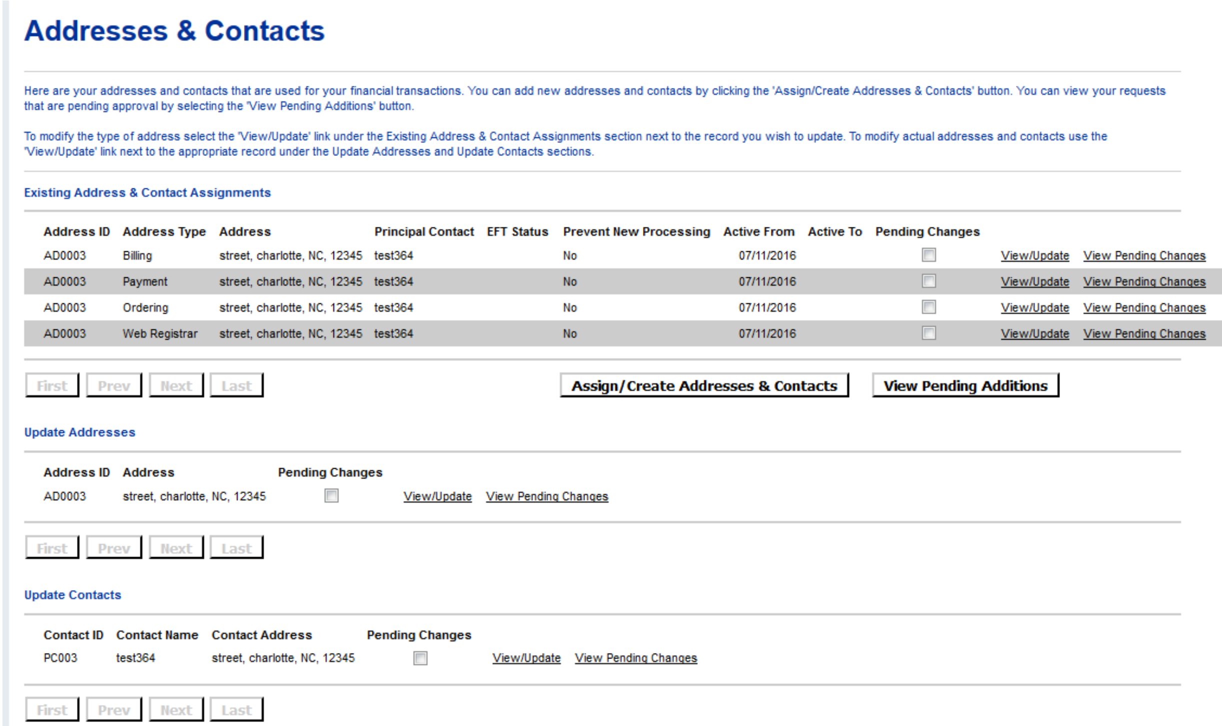
- Billing address – The address Mecklenburg County would send a bill to should we need to bill your company.
- Payment address – The address Mecklenburg County would mail payment to should the EFT system fail.
- Ordering address – The address Mecklenburg County would mail an order to should we not be able to send the order electronically.
- Web Registrar – This an Administrative address.

To change an address and/or a contact:

1. Login to https://www.meckprocure.com
2. Click on the Addresses & Contacts tab at the top of the screen



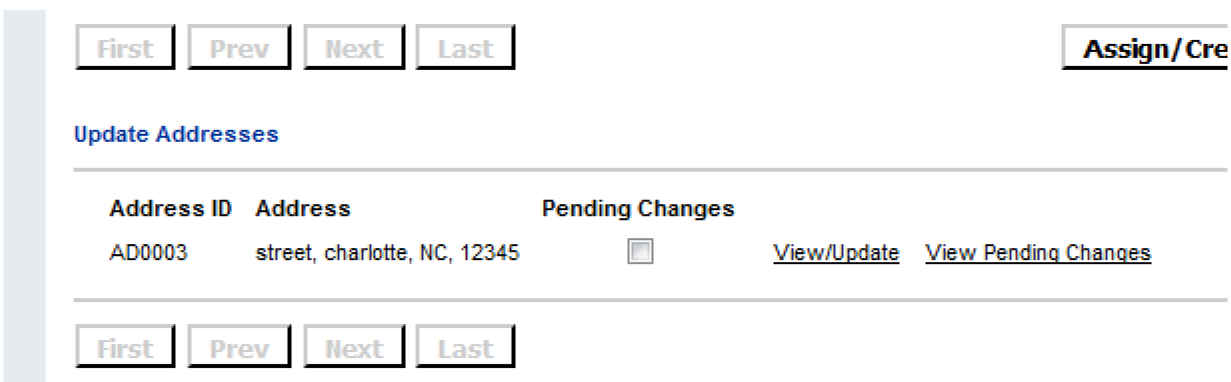
3. You will see this screen



The "Existing Address & Contact Assignments" section shows which contacts are associated to which addresses. You cannot change the addresses or contacts here.

4. To change an address

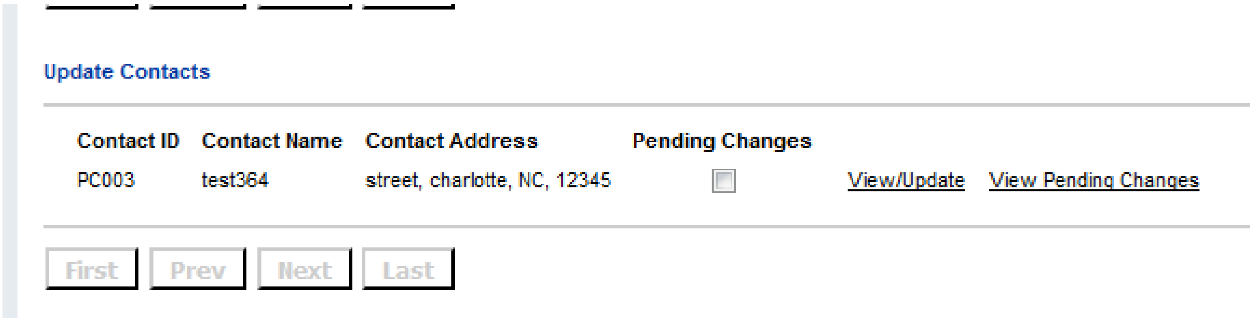
a. In the "Update Addresses" section, click the View/Update link to the right of the desired address.



b. Make the needed changes.

c. Click the Save button. Note that the Pending Changes box will be checked for the address that was changed. Once the change syncs with the County procurement system, this check box will be cleared.

5. **To change a contact**
   a. In the “Update Contacts” section, click the View/Update link to the right of the desired contact.



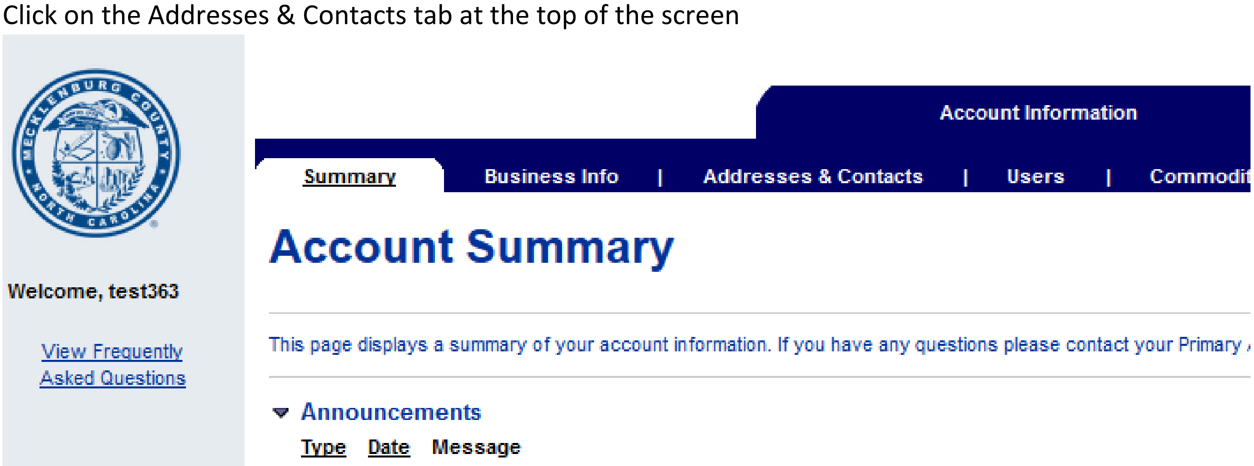
   b. Make the desired changes
   c. Click the Save button. Note that the Pending Changes box will be checked for the address that was changed. Once the change syncs with the County procurement system, this check box will be cleared.

How Add an Address and/or Contact

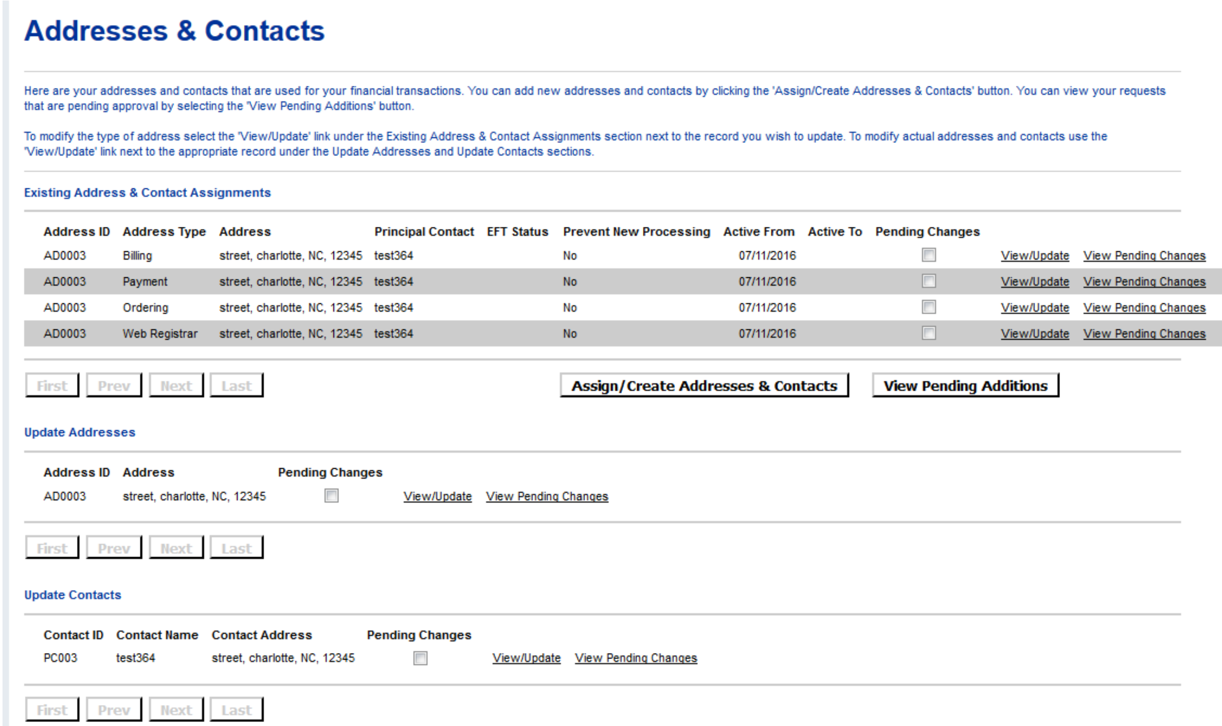
You can create four (4) different types of address. You may have as many of each address as desired.

- Billing address – The address Mecklenburg County would send a bill to should we need to bill your company.
- Payment address – The address Mecklenburg County would mail payment to should the EFT system fail.
- Ordering address – The address Mecklenburg County would mail an order to should we not be able to send the order electronically.
- Account Administrator – This tells us where the main administrative functions for your organization take place besides Ordering, Payment, and Billing.

1. Login to https://www.meckprocure.com
2. Click on the Addresses & Contacts tab at the top of the screen



3. You will see this screen



Addresses & Contacts

Here are your addresses and contacts that are used for your financial transactions. You can add new addresses and contacts by clicking the 'Assign/Create Addresses & Contacts' button. You can view your requests that are pending approval by selecting the 'View Pending Additions' button.

To modify the type of address select the 'View/Update' link under the Existing Address & Contact Assignments section next to the record you wish to update. To modify actual addresses and contacts use the 'View/Update' link next to the appropriate record under the Update Addresses and Update Contacts sections.

Existing Address & Contact Assignments

Address ID	Address Type	Address	Principal Contact	EFT Status	Prevent New Processing	Active From	Active To	Pending Changes		
AD0003	Billing	street, charlotte, NC, 12345	test364		No	07/11/2016		☐	View/Update	View Pending Changes
AD0003	Payment	street, charlotte, NC, 12345	test364		No	07/11/2016		☐	View/Update	View Pending Changes
AD0003	Ordering	street, charlotte, NC, 12345	test364		No	07/11/2016		☐	View/Update	View Pending Changes
AD0003	Web Registrar	street, charlotte, NC, 12345	test364		No	07/11/2016		☐	View/Update	View Pending Changes

First Prev Next Last   Assign/Create Addresses & Contacts   View Pending Additions

Update Addresses

Address ID	Address	Pending Changes		
AD0003	street, charlotte, NC, 12345	☐	View/Update	View Pending Changes

First Prev Next Last

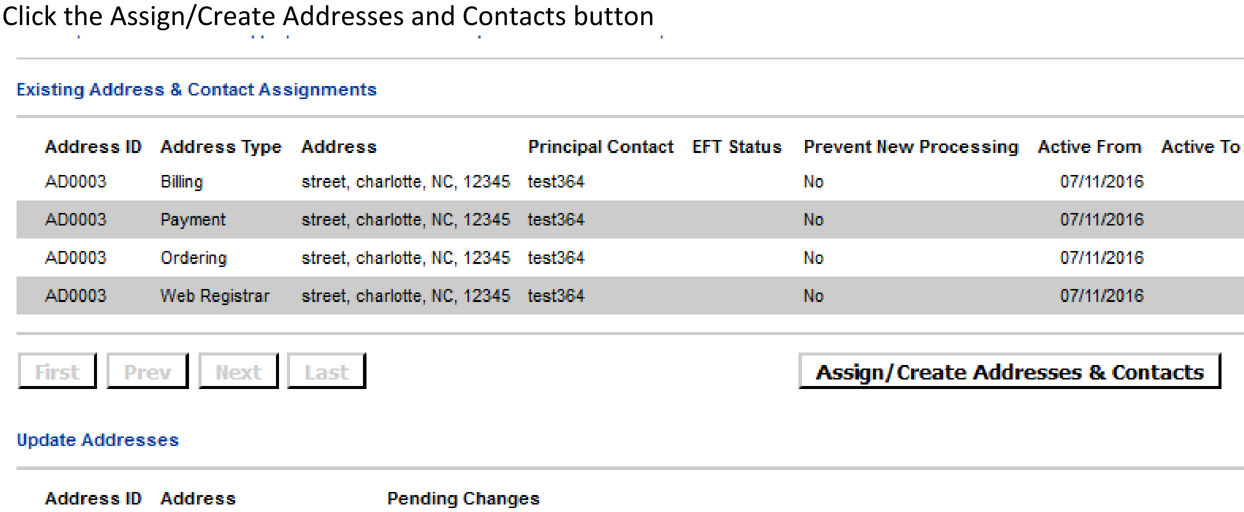
Update Contacts

Contact ID	Contact Name	Contact Address	Pending Changes		
PC003	test364	street, charlotte, NC, 12345	☐	View/Update	View Pending Changes

First Prev Next Last

The "Existing Address & Contact Assignments" section shows which contacts are associated to which addresses. You cannot change the addresses or contacts here.

4. Click the Assign/Create Addresses and Contacts button



Existing Address & Contact Assignments

Address ID	Address Type	Address	Principal Contact	EFT Status	Prevent New Processing	Active From	Active To
AD0003	Billing	street, charlotte, NC, 12345	test364		No	07/11/2016	
AD0003	Payment	street, charlotte, NC, 12345	test364		No	07/11/2016	
AD0003	Ordering	street, charlotte, NC, 12345	test364		No	07/11/2016	
AD0003	Web Registrar	street, charlotte, NC, 12345	test364		No	07/11/2016	

First Prev Next Last   Assign/Create Addresses & Contacts

Update Addresses

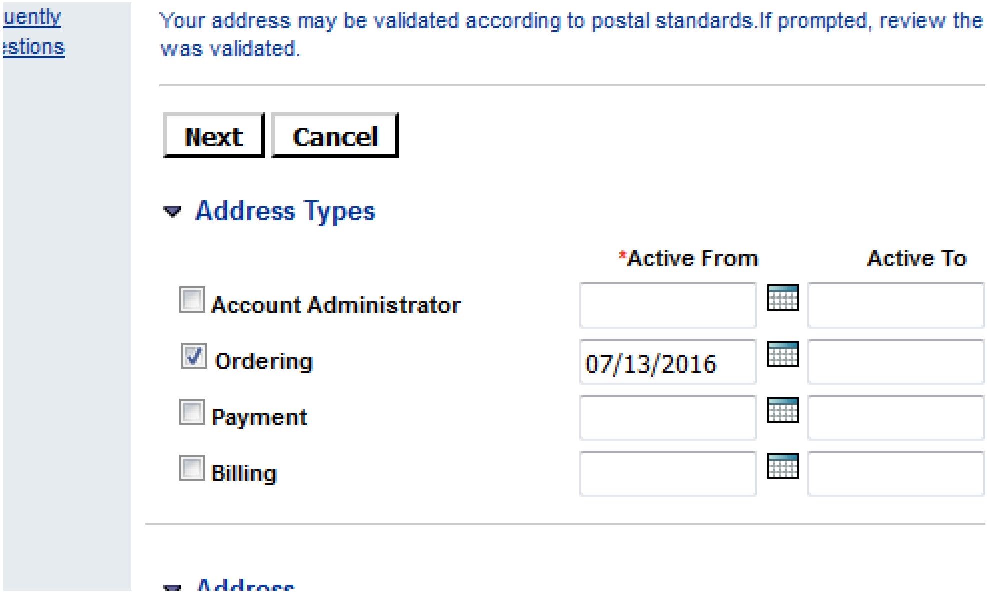
Address ID	Address	Pending Changes

5. Choose the Address Type

6. Enter the Active Date (the date the address can start to be used)
7. If this new address will be the default address for the selected Address Type, check the Default Record box.
8. If desired, enter a Department or Division
9. If you want to duplicate an existing address of another type do the following. Otherwise go to step 10.
    a. Click the Find button to the right Address ID

    b. Choose the address to duplicate. This will cause the remaining address fields to be completed
10. Enter the complete address: Street, City, State/Province, Zip/Postal Code
11. Ensure the Country Name is correct
12. Enter a phone

13. Click Next

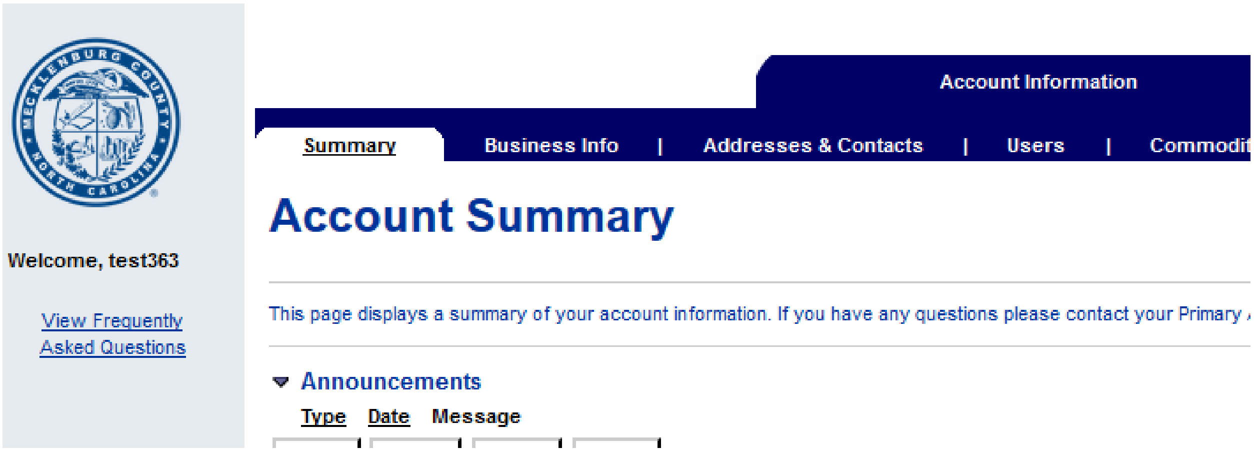


14. Complete the Principle Contact for this address
    a. If the Principle Contact will be the same as one that exists, do the following. Otherwise go to step 14.b
        i. Click the Find Button to the right of the Principle Contact ID
        ii. Choose the appropriate contact
        iii. The required fields will be filled in
    b. Enter a Contact Name
    c. Enter the Email
    d. Enter the Phone
    e. All other fields are not required
15. Click Next
16. Click Save
17. The new address and contact will be displayed after MECKProcure syncs with the County's procurement system. Till then, use the View Pending Additions to see recently added addresses and contacts.

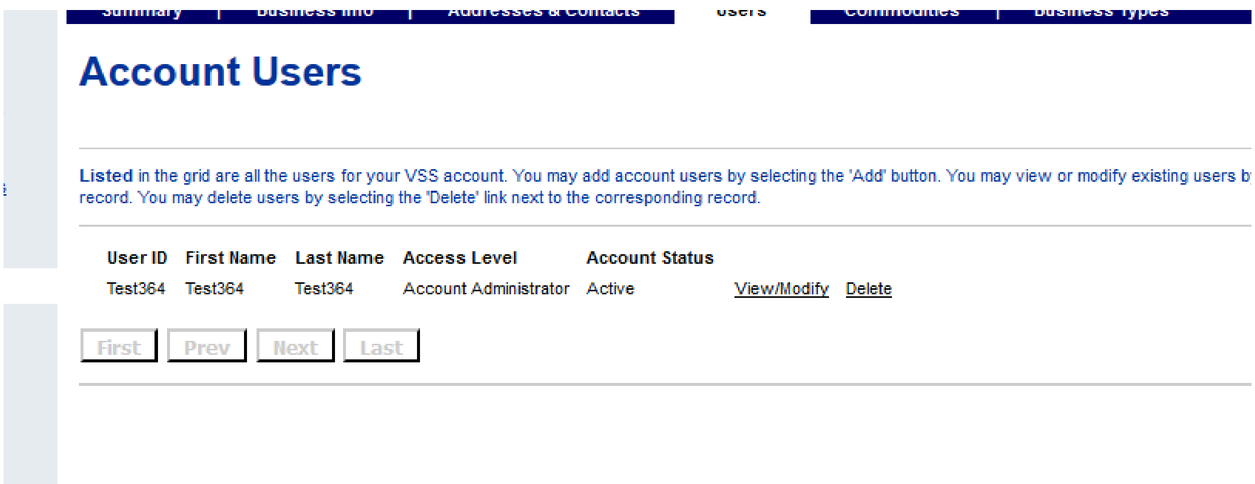
How to Add Account Users

You can add as many account users as desired. You can designate the access rights for each.

1. Login to https://www.meckprocure.com
2. Click on the Users tab at the top of the screen

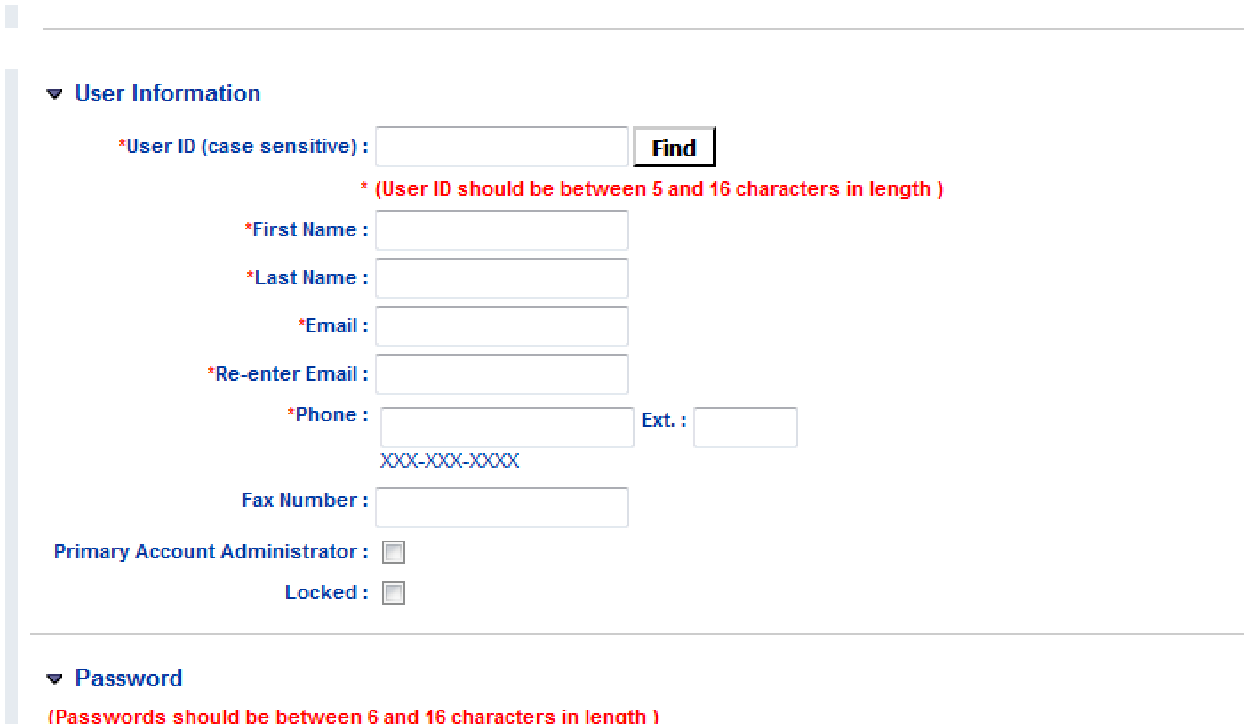


3. You will see this screen

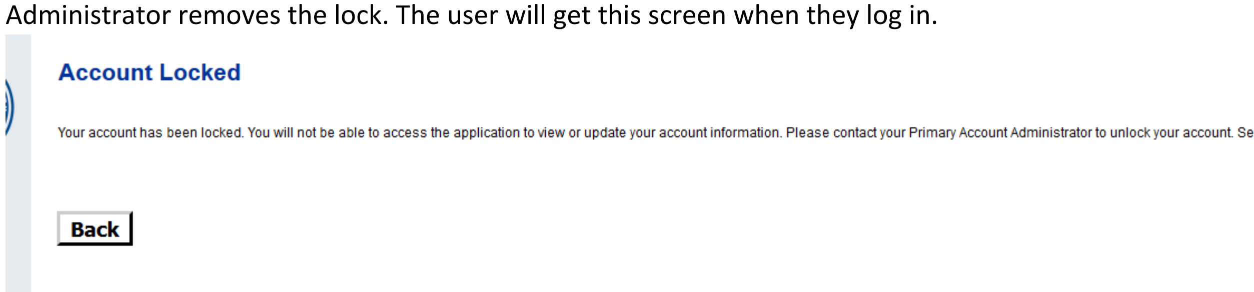


4. Click the Add button

5. Enter the User Information

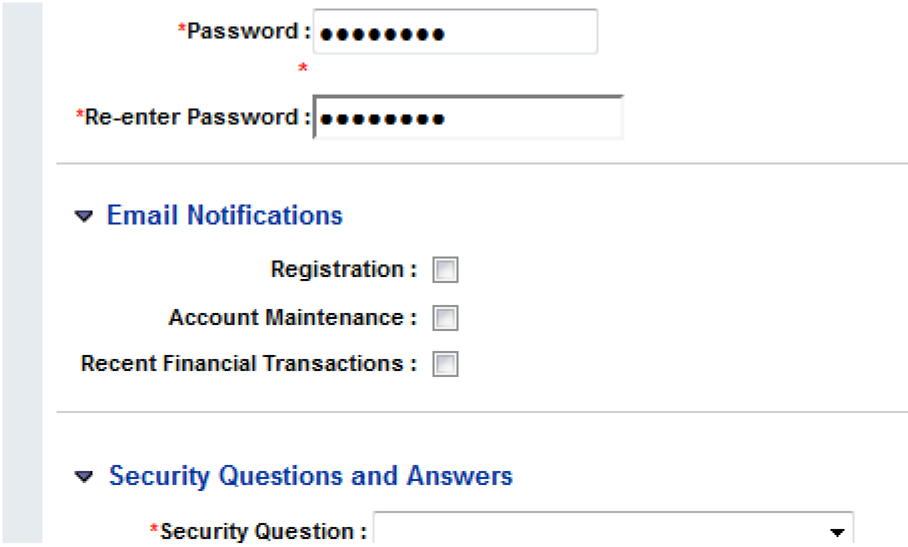


a. User ID
b. First and Last Name
c. Email
d. Phone
e. If Primary Account Administrator is chosen, the user will be able to:
    i. Grants VSS account access to other individuals in their organization.
    ii. Designates another individual to perform the role of the Primary Account Administrator.
    iii. Primary point of contact to receive all emails related to your account status.
    iv. Primary point of contact for other individuals in your organization requesting VSS account access. (Or a password reset)
f. If Locked is chosen, the user not be able to access the account till an Account Administrator removes the lock. The user will get this screen when they log in.



g. Set a Password

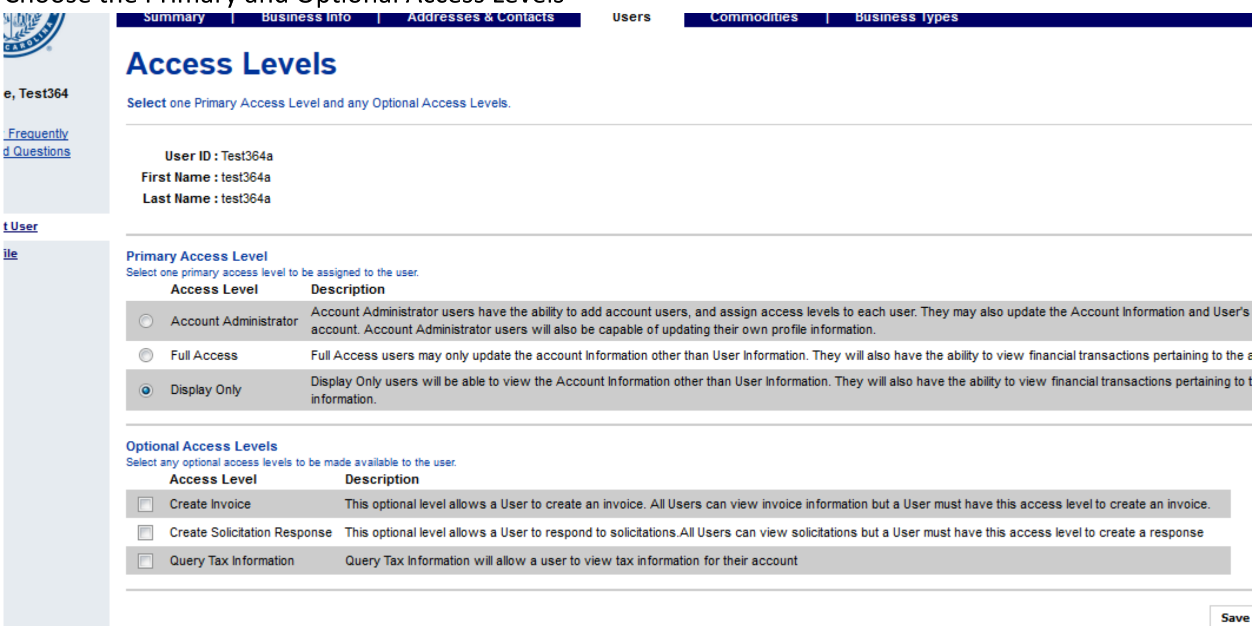
h. Choose actions this user will receive Email Notifications for.



i. Set the Security Questions and Answer

j. Click Next

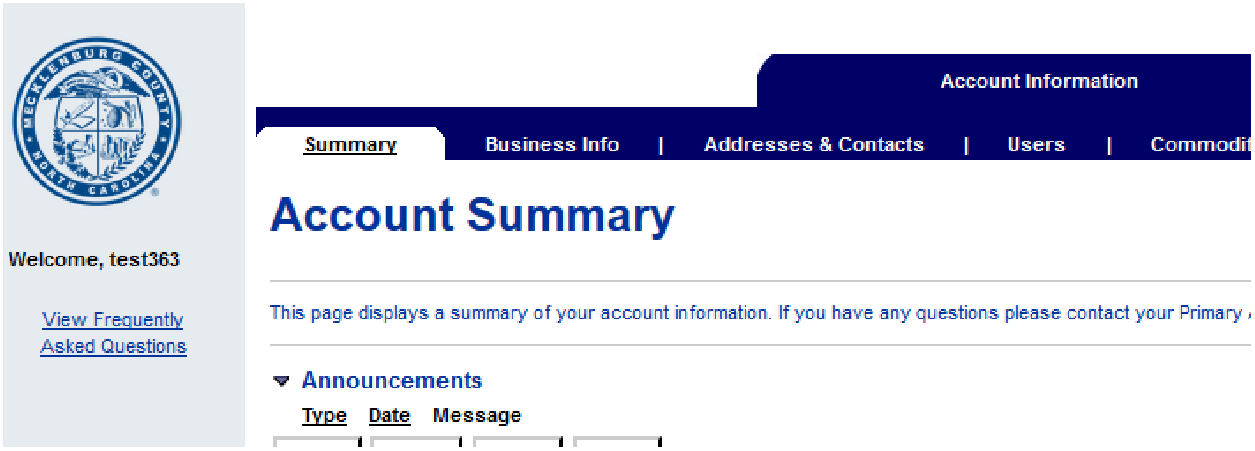
k. Choose the Primary and Optional Access Levels



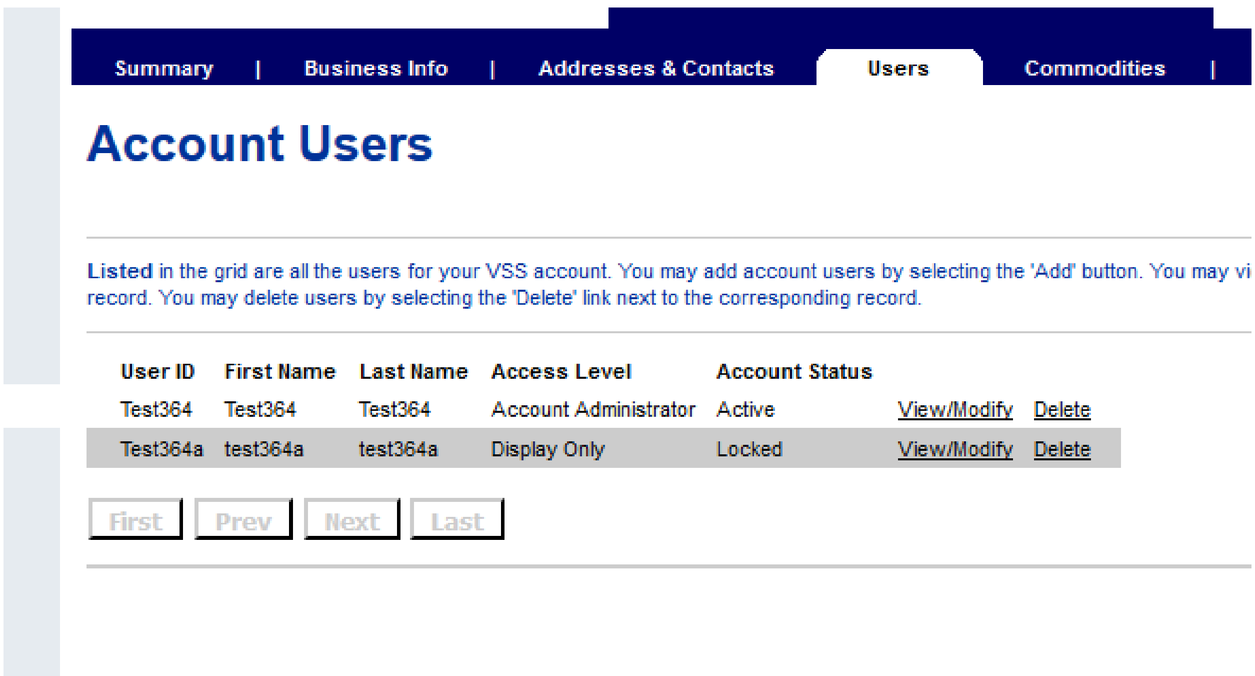
l. Click Save

How to Modify an Existing User

1. Login to https://www.meckprocure.com
2. Click on the Users tab at the top of the screen



3. You will see this screen



4. Click the View/Modify link to the right of the desired user.
5. User Information
    a. Make any needed changes
6. Email Notification
    a. Make any needed changes
7. Security Questions and Answers
    a. Make any needed changes
8. Change Access Level
    a. Click the Change Access Levels button
    b. Make any needed changes
    c. Click Save

9. Change Password
    a. Click the Change Password button
    b. Type and retype the new password
    c. Click Save
10. Click Save

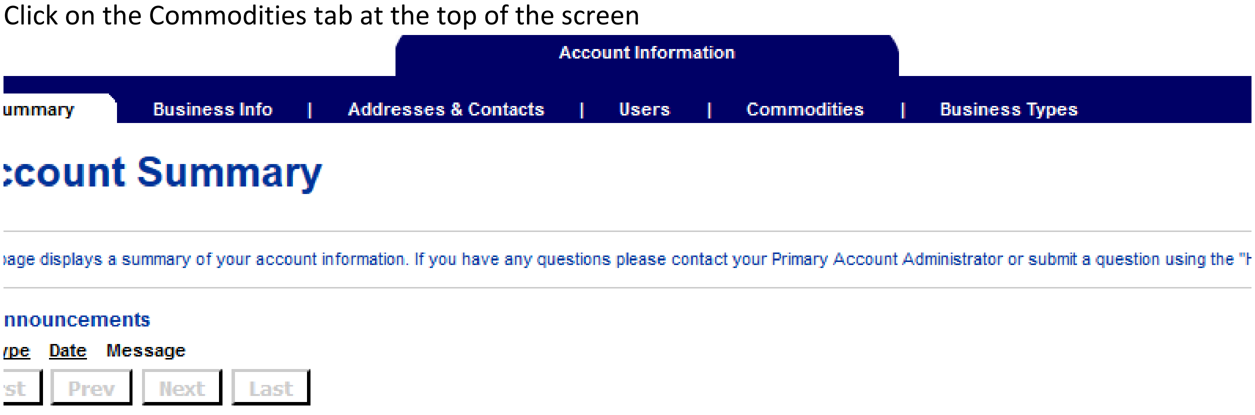
How to Add/Remove Commodity Codes

Commodity codes define the products and services you company offers. Mecklenburg County uses the codes companies choose to:

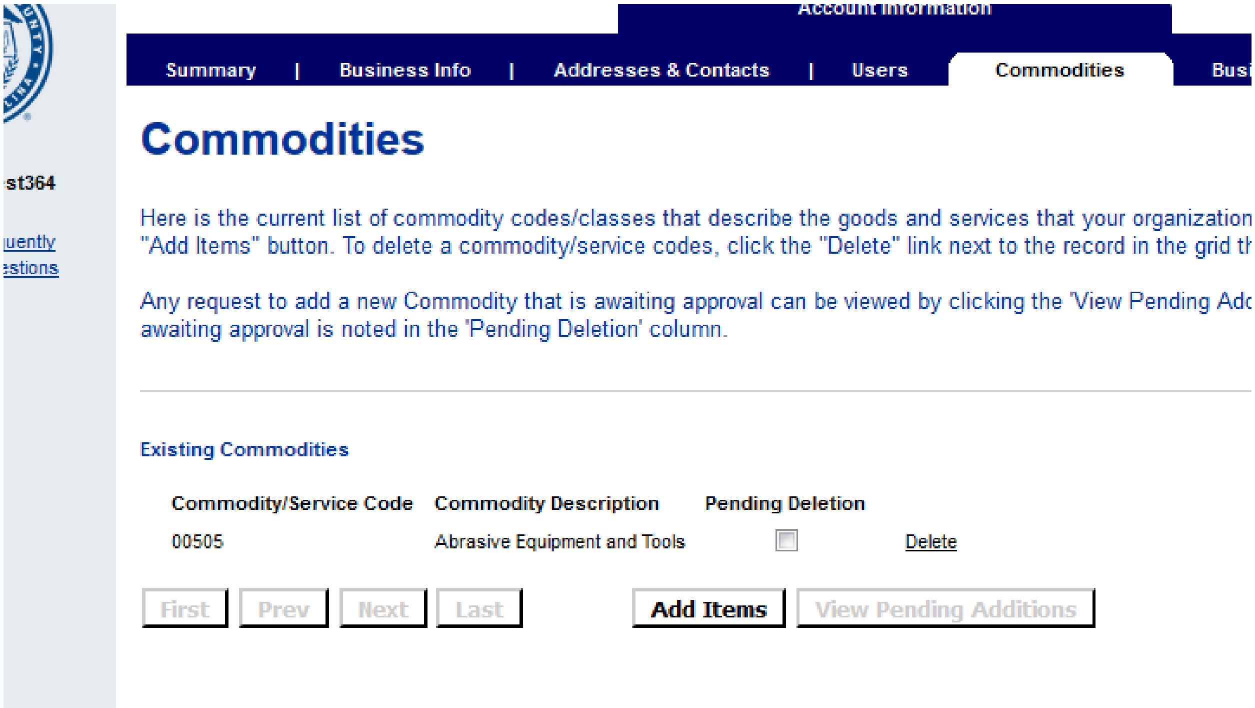
- Do searches to find a vendor for a need
- Distribution lists for quoting and bidding opportunities
- And more…

If you don't have all the codes that apply to your company associated to your company, you may miss an opportunity.

1. Login to https://www.meckprocure.com
2. Click on the Commodities tab at the top of the screen

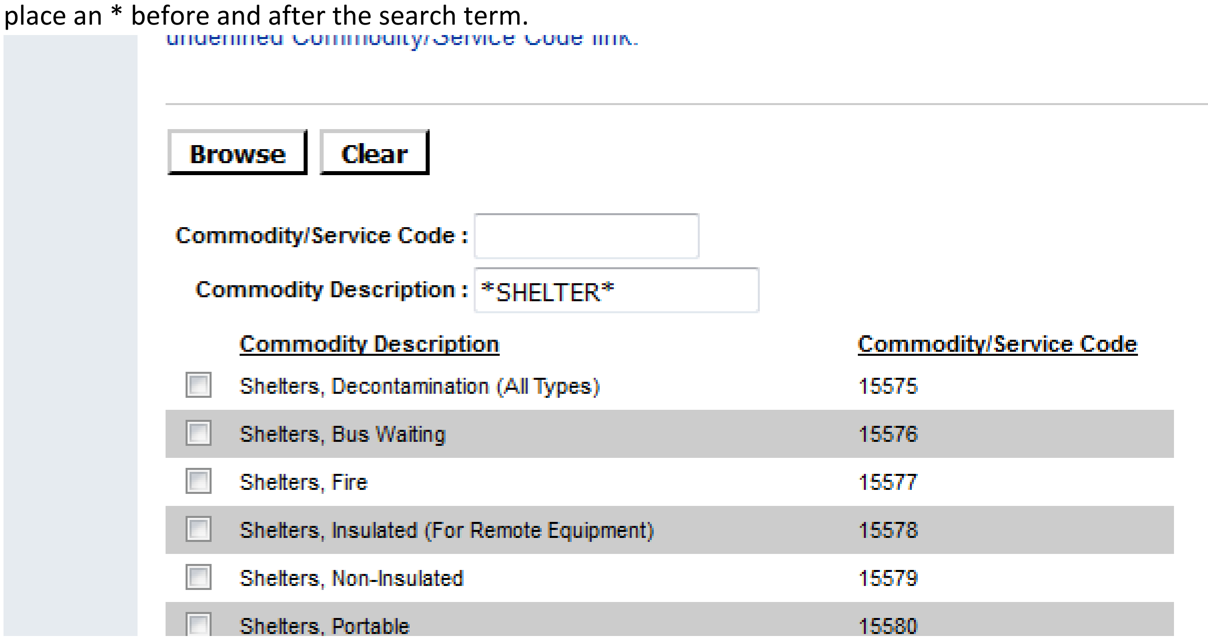


3. You will see this screen



4. To add a commodity code

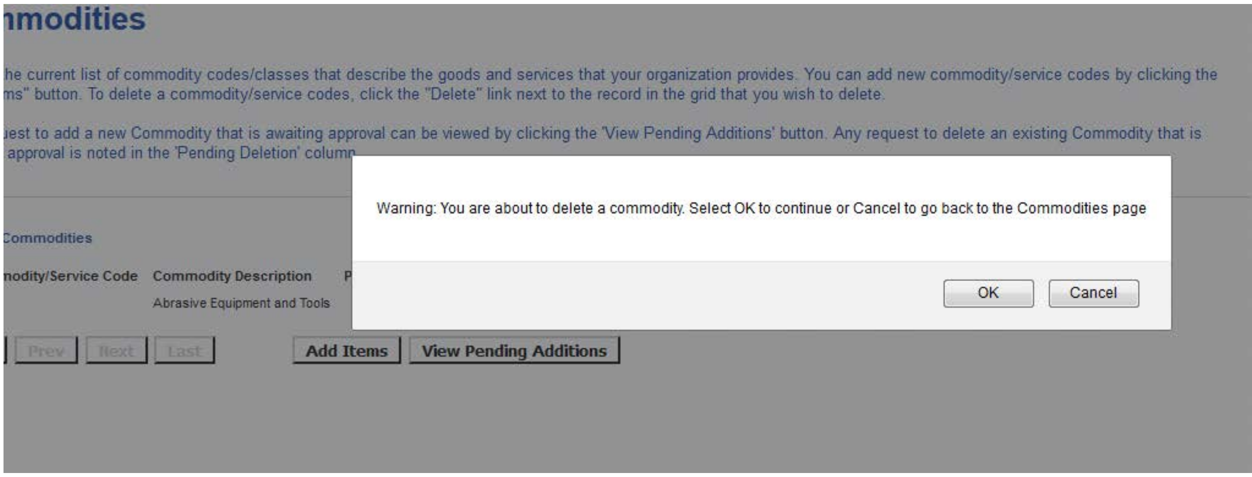
a. Click the Add Items button
b. Find the codes that apply and check the box to the left of the description. If using the Commodity Description field to do key word searches, it is recommended to place an * before and after the search term.



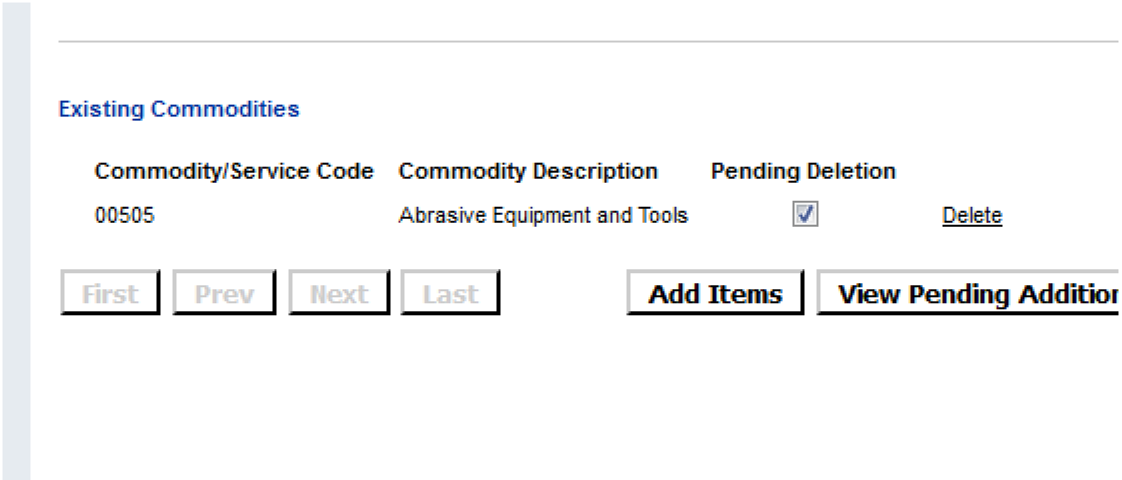
c. If your search gives you more than one page of results, choose all that apply, then click OK.

To see all the added codes, click the View Pending Codes button. The added codes will display in the main list once they have synced with the County procurement system.

5. To delete a code
   a. Click the Delete link to the right of the desired code.
   b. You will get this warning



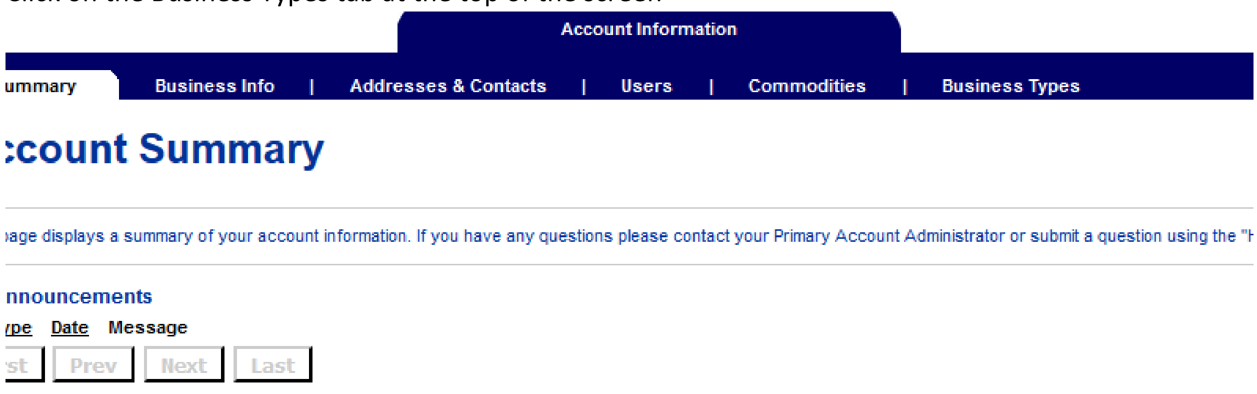
   c. Click OK if you want to proceed. Otherwise click Cancel.
      If OK was clicked, the Pending Deletion box will be check for the code till it syncs with the County procurement system.



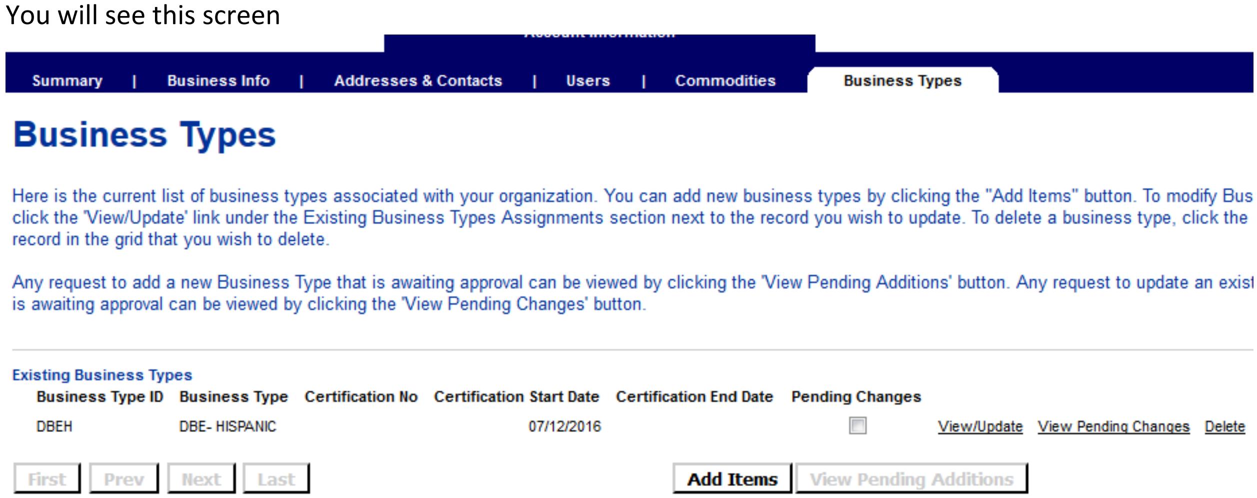
How to Add/Update/Delete Business Types (MWSBE/HUB certifications)

Mecklenburg County tracks its usage of MWSBE (Minority/Woman/Small Business Enterprise) and HUB (Historically Under-utilized Business) businesses. Mecklenburg County recognizes most certifying agencies, as long as the certification has a reasonably rigorous process for certifying your business's standing. Mecklenburg County cannot give preference based on MWSBE/HUB status. The County does actively pursue ensuring MWBSE/HUB businesses have equal opportunity to do business with Mecklenburg County and the County does set MWSBE/HUB goals for each procurement project. All MWSBE/HUB certifications that are entered into MECKProcure are required to have a certification and will be vetted/approved by the Vendor Management Program Office (VMPO) prior to acceptance.

1. Login to https://www.meckprocure.com
2. Click on the Business Types tab at the top of the screen

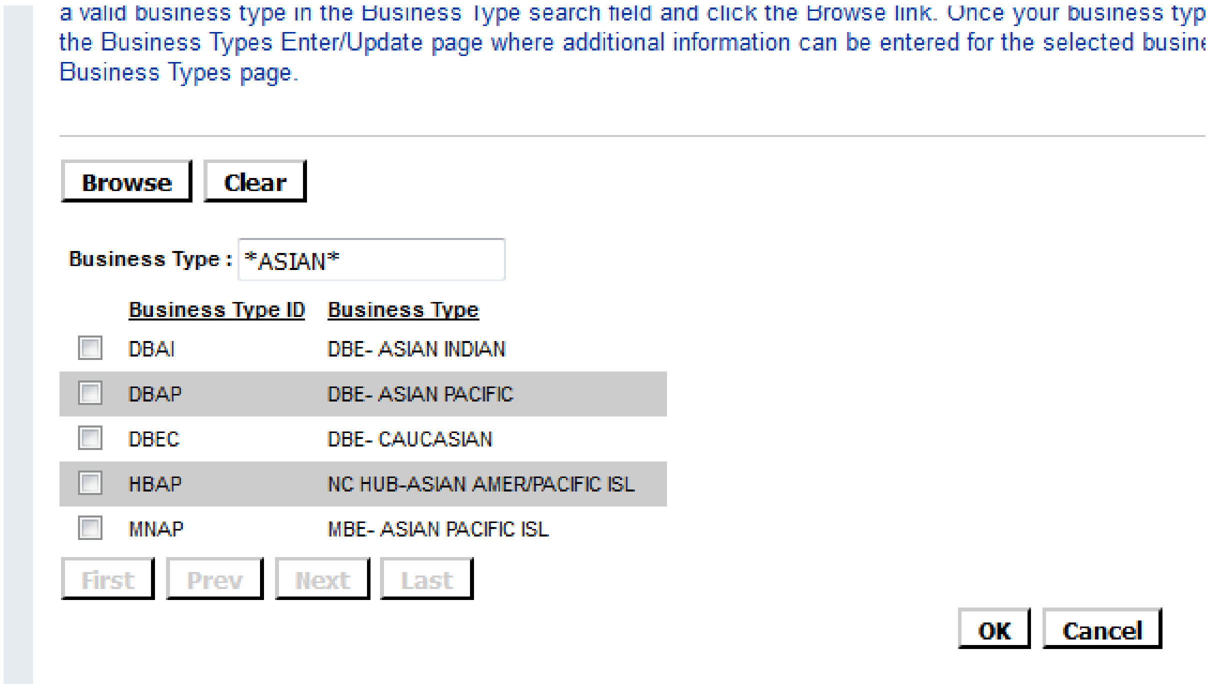


3. You will see this screen



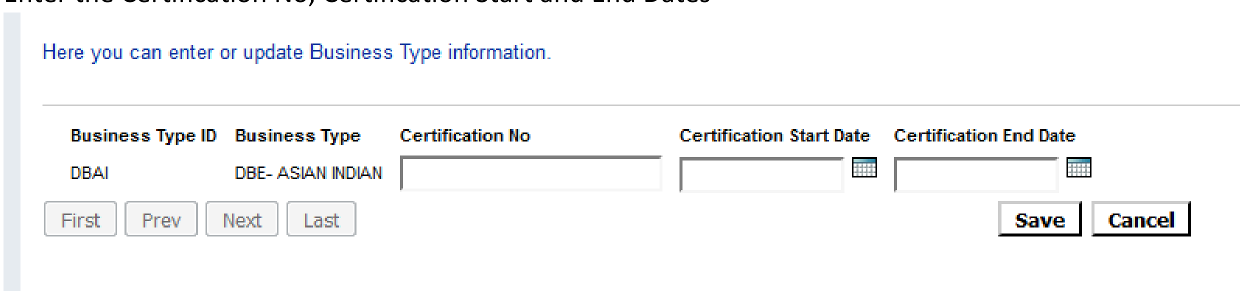
4. **Add a Business Type (MWSBE/HUB certification)**
    a. Click the Add Items button
    b. Find the Business Type/s that apply to your business and certifications and check the box to the left of the Business Type ID.
    If using the Business Type field to do key word searches, it is recommended to place an

* before and after the search term.



c. If your search gives you more than one page of results, choose all that apply, then click OK.

d. Enter the Certification No, Certification Start and End Dates

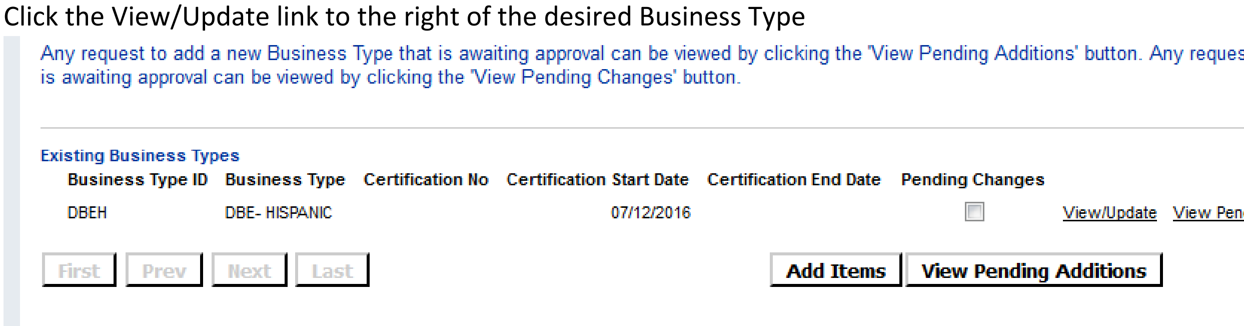


e. Click Save

f. The new Business Type will display after MECKProcure syncs with the County procurement system. Till then, click the View Pending Additions button to vie the new entries.

5. To Update an existing Business Type (MWSBE/HUB certification)

a. Click the View/Update link to the right of the desired Business Type

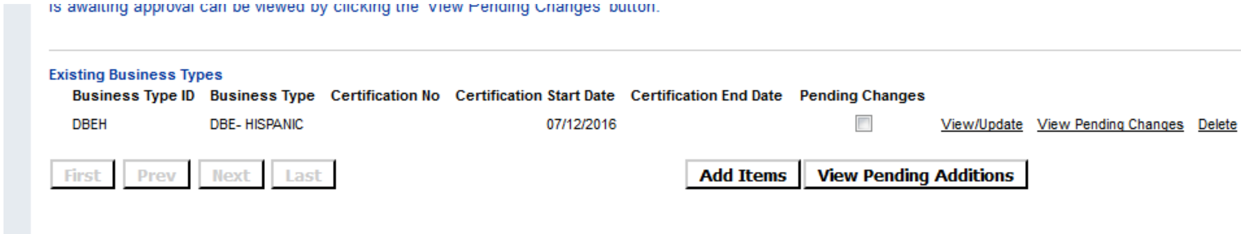


b. Make the needed changes

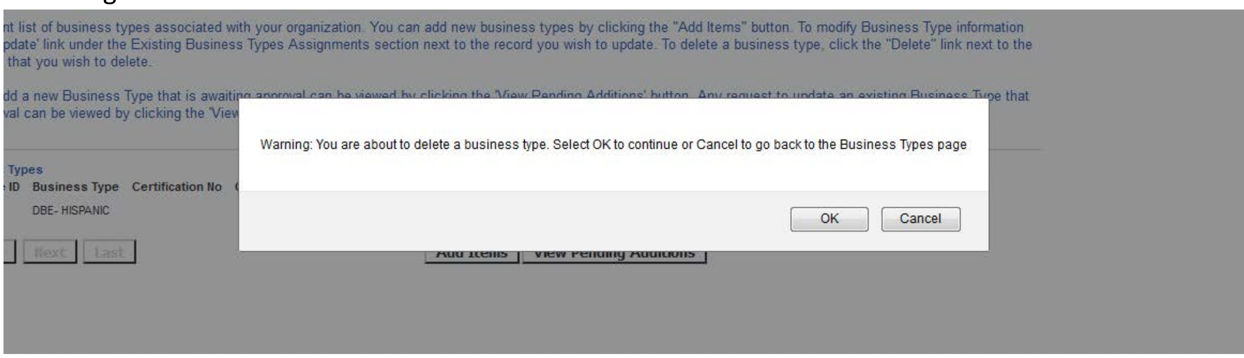
c. Click Save

6. To Delete a Business Type (MWSBE/HUB certification)

a. Click the Delete link to the right of the desired Business Type



b. You will get



c. Click OK to proceed. Otherwise, click Cancel.