



THE RESEARCH FOUNDATION
The State University of New York
University at Albany

Date: May 30, 2008
To: Deans, Directors and Principal Investigators
Sponsored Programs Administrators and Management Staff
From: Sponsored Funds Financial Management
Re: W-9 requirement

We have received recent communication from Research Foundation Central Office which announced changes to the mandates surrounding the Research Foundation Supplier File.

The Supplier File contains information for each and every person or entity which has entered into business with the Research Foundation; from a company with which we placed an order to an individual who received reimbursement for travel expense or a stipend of some sort. The campuses are required to follow strict standards in using the supplier file, as you can imagine the file contains important information for required IRS tax reporting. Tax reporting is done by Central Office, not each campus, therefore it is imperative that the campus supply accurate and adequate information.

In efforts to increase the accuracy of our tax reporting, Central Office has recently altered the supplier information the campuses are required to supply. Effective May 19th, the campuses are now required to have a W-9 on file for every supplier, person or business. The exception to this requirement is for that of a SUNY or Research Foundation employee.

Therefore, we would like to not only make you aware of this mandate, but also request your assistance in meeting it. In order to avoid delays in payment, please be sure requests submitted to SFFM for payment to businesses or non-employees not previously paid are accompanied by a completed W-9 form. The form can be easily accessed from the IRS web page; <http://www.irs.gov/pub/irs-pdf/fw9.pdf>. A link will also be available on our web page. Should you submit a request to our office for which a W-9 is needed, we will do our best to notify you as such as well as request your assistance in obtaining the form. Meeting this new requirement without incurring significant payment delays will need to be a team effort between our office and yours.

We ask that you also share this correspondence with your faculty, colleagues, and staff as appropriate. Please direct any questions to SFFM@uamail.albany.edu.

Thank you in advance for your understanding and cooperation.