

## 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

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## 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](http://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.