UNIVERSITY OF HAWAII

Vendor Maintenance in KFS

Creating, Editing, and Searching

Fiscal Services Office

October 2014
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# Vendor Workflow

<table>
<thead>
<tr>
<th>Vendor Maintenance (PVEN)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Initiator</strong></td>
</tr>
<tr>
<td>User initiates a Vendor eDoc (PVEN) to create a new vendor or edit an existing vendor</td>
</tr>
<tr>
<td>User attaches supporting documentation and submits the eDoc for processing</td>
</tr>
<tr>
<td>Initiator receives an FYI action for the Vendor eDoc</td>
</tr>
<tr>
<td><strong>Vendor Reviewer (Disbursing)</strong></td>
</tr>
<tr>
<td>Vendor Reviewer reviews and approves/disapproves the Vendor eDoc</td>
</tr>
<tr>
<td>Vendor eDoc is approved</td>
</tr>
<tr>
<td>Vendor is foreign</td>
</tr>
<tr>
<td><strong>Tax Manager (Disbursing)</strong></td>
</tr>
<tr>
<td>Tax Manager reviews and approves/disapproves the Vendor eDoc</td>
</tr>
<tr>
<td>Vendor eDoc is approved</td>
</tr>
<tr>
<td>Vendor record is created and number is assigned</td>
</tr>
</tbody>
</table>

Note: The initiator will receive an FYI notification when the Vendor eDoc is either approved or disapproved by Disbursing’s Vendor Reviewers.

## Searching and Creating for a Vendor in KFS

The Vendor Maintenance eDoc (vendor eDoc or PVEN) is used to search for vendors, create new vendors, and maintain existing vendors. Vendors have many different attributes that may in some cases determine how and when they may be used. There are two vendor types: Disbursement Voucher (DV) and Refund. Disbursement Voucher type vendors may be used on DV and Requisitions (REQs). Refund type vendors are limited and can only be used on DVs and only for refund payments.

Vendors are available for use on two other eDocs that allow you to select a vendor: Requisition (REQ) and Disbursement Voucher (DV). Vendor information also appears on other eDocs, e.g., Purchase Order (PO), Payment Request (PREQ), and on the Accounts Payable (AP) feeds for Pre-Disbursement Processor (PDP) customers.

Vendor numbers are not required for faculty and staff. Their information is updated daily from Peoplesoft into KFS. To search for faculty or staff employees, you’ll need to search in the Disbursement Voucher eDoc. (Refer to section on How to Search for Faculty and Staff Employees through the Disbursement Voucher later in this guide.) Students and RCUH employees do require a vendor number in KFS.

To begin searching or creating a vendor, go to Main Menu→Lookup and Maintenance→Vendor→Vendor, click on Vendor.
Searching for a Vendor

The first step in creating a new vendor is to determine whether or not the vendor exists in the KFS vendor database. When you select Vendor from the Main Menu, the Vendor Lookup screen opens.

The Vendor Lookup screen enables you to search for existing vendors in the vendor database. The search may be based on several criteria, both individually or simultaneously.

Vendor Lookup Screen
In the Vendor Lookup screen, you may search for existing vendors using the following criteria:

1. **Vendor Name** - This may be the vendor’s legal name or an alias if the vendor has one. Use the wildcard asterisk (*) before and/or after the name when searching by a partial name.
   a. For example, to search for a company like the *Hale Nani Rehabilitation and Nursing Center*, you could enter “HALE NANI*”. See result below. (Note the wildcard asterisk is used after “NANI”.)
   b. For example, to search for an individual like *Ahinga, Pomaikaiokalani L*, you could enter “*POMAIKA*”. See result below. (Note: the wildcard asterisk is used BEFORE and AFTER “POMAIKA”.)
2. Tax Number - A 9-digit taxpayer identification number, Federal Employer Identification Number (FEIN) or Social Security Number (SSN) is entered for the vendor when created in the KFS database. If you are unable to find a vendor using the Name fields, you could search using the tax number field. This may save you the trouble of entering all the vendor data only to find a vendor already exists with the same tax number.

(Note: The wildcard asterisk is not allowed when searching with tax numbers.)

a. For example, suppose you are looking for a Department of Education (DOE) school called the Ahuimanua Elementary School and their tax number is 990266482. If you didn’t first try to search for this vendor and immediately began creating a new vendor, when you click Submit, you will receive an error message, “This tax number has already been assigned to an existing vendor.” If you had begun your search using the Vendor Lookup screen or searching with the tax number, you would have avoided spending time creating the vendor request.

b. In this example, let’s search for the Department of Education by entering their tax number “990266482”. See result below. There are 181 vendor records using this tax number. In this case if you wanted to add a new school, you will need to find the parent vendor number and create a Division. The parent vendor is 17051-1. We know this because there are two options in the Actions column; Edit or Create a Division. You would click Create a Division to add a new school.
3. Vendor # - This is the number that is assigned to a vendor in the KFS vendor database. It is a unique identifier for the vendor. Vendor numbers ending in "-0" normally, though not necessarily, indicate a parent vendor, while other suffixes "-1, -2, etc." represent divisions (children). When searching, the suffix, e.g., "-0, -1, etc." is not required. Enter the appropriate vendor number.

4. Active Indicator - Use this field to limit your search to view only active vendors, only inactive vendors, or both active and inactive vendors. Inactive vendors may not be used on KFS eDocs.

5. Vendor Type - This field enables you to limit your search to a specific vendor type, e.g., Disbursement Voucher or Refund.

6. State - This is the US state in which the vendor is located

7. Commodity Code – (Not used.) These are the commodity codes that have been assigned to a vendor. The codes can be assigned at time of vendor setup, but generally they are assigned when a Requisition is submitted. Commodity codes will not be used at UH; this field will return no results.

8. Supplier Diversity – (Not used.) These are the codes that designate a vendor as a small and/or diverse business. Supplier Diversity will not be used at UH; this field will return no results.

9. Click Search button.

How to Search to Faculty and Staff Employees

10. To search for faculty and staff employees, you must begin by opening a disbursement voucher (DV) screen.

    Go to Main Menu→Transactions→Financial Processing→Disbursement Voucher.

    a. Once in the DV eDoc, click on the magnifying glass in the Payee ID field.

    b. From the Payee Lookup screen, first select a payment reason and then search for the employee using the fields: Person First Name, Person Last Name, or Employee ID.

    c. In the Address field, if you see a line of asterisks masking the address, an address exists for that faculty or staff. If you see two commas separated by a space, this means there is no address available. (This
also means you cannot process a DV to this faculty or staff employee. If there is no address (i.e., only two commas), one of the following conditions may apply:

i. Peoplesoft may need to be updated. Check with your Personnel Officer and verify that the faculty or staff’s HOME address in Peoplesoft is correct.

ii. If the address in Peoplesoft is correct and you still see the two commas, submit a trouble ticket to KFS and indicate you have verified the address with your Personnel Officer. (To submit a trouble ticket: From the KFS main screen, click in the upper right hand corner Help Resources→Help Resources→Submit Trouble Ticket.)

iii. The screenshot below is an example where the first employee has an address as shown by the asterisks and second employee does not have an address as shown by the two commas.

11. Faculty and staff employees do not require a vendor numbers in KFS. Their information is downloaded from Peoplesoft on a daily basis.

12. Students and RCUH employees do require a vendor number in KFS.

**Buttons**

When searching for a Vendor the following buttons will appear.

13. Click the Search button to return the results of your search.

14. Click the Clear button to remove prior search criteria.

15. Click the Cancel button to cancel the eDoc.

**Note:** You will be able to look up vendors who exist in the database; however, certain information on the vendor record, i.e., attachment and notes, will not be available to general users. Per security policy, sensitive data is restricted to Disbursing Office Vendor Reviewers.
Search Results

16. Sample of searching for vendors with no criteria selected.
   a. The screenshot below shows there are 29,890 vendor records in KFS as July 2014.
   b. However, only the first 500 can be displayed at one time.
   c. You'll need to narrow your search with one or more criteria to find your particular vendor.

![Vendor Search Screenshot]

Creating a Vendor

If the vendor is not found in the KFS database after searching in the Vendor Lookup, a new vendor code should be created. Request a new vendor number by opening the Vendor eDoc located in the Main Menu→Lookup and Maintenance→Vendor→Vendor, and then click the Create New button in the upper right hand corner. After completion, your request is routed to the Disbursing Office Vendor Reviewers. Requests for foreign vendors will be automatically routed to the Disbursing Office Tax Manager and Vendor Reviewer.

The Vendor eDoc contains an information box, 15 tabs, and action buttons. (See Vendor eDoc screenshot below.) In most cases, only four tabs need to be completed to create a new vendor. The four tabs include: Document Overview, Vendor, Address, and Notes and Attachments. This process document will begin with these four tabs.

The other 11 tabs are optional or not used.

If the vendor is foreign, information may be entered into the tab called NRA Extended Attributes but this is not required. Non Resident Alien (NRA) information is optional and all information entered will be reviewed by the Tax Manager.

The Vendor eDoc screen is displayed below. The tabs you must complete to create a vendor are explained below.
1. Doc Nbr = system assigned eDoc Number
2. Initiator = UH username of person initiating eDoc
3. Status (Document Status)
   a. Initiated = The eDoc has been started but not yet saved
   b. Saved = The eDoc has been saved but has not been completed (submitted)
   c. Enroute = The eDoc has been submitted and is going through workflow routing
   d. Final = The eDoc has been fully approved
   e. Disapproved = The eDoc was disapproved by one of the workflow approvers
   f. Cancelled = The eDoc was cancelled before submission
4. Created = Time and Date eDoc was initiated
Document Overview Tab

As in all KFS eDocs, only the tabs that have required information are initially opened upon selecting create new. To request a new vendor, let’s begin with the Document Overview tab.

**Document Overview**

1. **Description** - (Required) Enter a business related description. This field is 40 spaces. The Vendor eDoc Description field is required using the following naming conventions which are dependent on the purpose of the eDoc submission. Uppercase or lowercase is accepted in this tab.
   a. New Vendor: FO #-NEW Vendor Name or Last Name. Example: 060-NEW Hawaii Gas or 060-NEW Smith.
   b. New Vendor (Foreign): FO #-NRA Vendor Name or Last Name. Example: 060-NRA Viceroy India or 060-NRA Smith.
   c. Edit Vendor: FO #-EDIT Vendor Name or Vendor #. Example: 060-EDIT Hawaii Gas or 060-EDIT 1904-0.
   d. Edit Vendor (Foreign): FO #-NRA EDIT Vendor LastName or Vendor #. Example: 060-NRA EDIT SMITH or 060-NRA EDIT 15678-0
   e. Create Division: FO #-DIV Vendor Name or Vendor #. Example: 060-DIV Hawaii Gas or 060-DIV 1904-0
   f. Create Division (Foreign): FO #-NRA DIV Vendor Name or Vendor #. Example: 060-NRA DIV Univ of Victoria Press or 060-NRA DIV 15678-0
   g. Create Refund Vendor: FO #-REF Last Name. Example: 060-REF Smith
2. **Explanation** – (Optional) Enter a more detailed description. Describe what you want accomplished. A detailed explanation will help the vendor reviewer understand what you want done. Failure to explain may lead to the vendor reviewer disapproving your request. This field will accommodate up to 400 spaces.
3. **Organization Document Number** – (Optional) Use for department reference. This field is 10 spaces.
Vendor Tab  
(General Information, Corporate Information and Detail Information)

General Information

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vendor #</td>
<td>A unique, system-generated number that identifies this vendor, assigned at</td>
</tr>
<tr>
<td></td>
<td>the time the eDoc is approved.</td>
</tr>
<tr>
<td>Vendor Parent</td>
<td>System generated (indicates that the particular vendor is the parent vendor</td>
</tr>
<tr>
<td>Indicator</td>
<td>for one or more Divisions (children).</td>
</tr>
<tr>
<td>Vendor Name</td>
<td>(Required if a company or business) This field is used for business or</td>
</tr>
<tr>
<td></td>
<td>company names. Do not use Individual names unless it is a name of a</td>
</tr>
<tr>
<td></td>
<td>business, e.g., JACK RUSSELL PHOTOGRAPHY. This field is 45 spaces.</td>
</tr>
<tr>
<td>Vendor Last</td>
<td>(Required if individual and if Vendor Name field is blank.) If individual's</td>
</tr>
<tr>
<td>Name</td>
<td>name contains a suffix, e.g., “JR”, enter suffix after individual’s last</td>
</tr>
<tr>
<td></td>
<td>name, e.g., “PUBLIC JR”. This field is 22 spaces.</td>
</tr>
<tr>
<td>Vendor First</td>
<td>(Required if individual and if Vendor Name field is blank.) If the individual’s name contains middle initials, e.g., “Q”, enter after the individual’s first name, e.g., “JOHN Q”. This field is 21 spaces.</td>
</tr>
<tr>
<td>Name</td>
<td>For naming convention guidelines, refer to KFS Vendor Rules, Vendor Name,</td>
</tr>
<tr>
<td></td>
<td>Address Conventions, and Common Abbreviations appendices at the end of this</td>
</tr>
<tr>
<td></td>
<td>document.</td>
</tr>
<tr>
<td></td>
<td>Except for the preceding Document Overview tab and only in the vendor eDoc,</td>
</tr>
<tr>
<td></td>
<td>all vendor tabs will convert lowercase font to uppercase automatically.</td>
</tr>
</tbody>
</table>
Corporate Information

Vendor Type – (Required) Select the appropriate vendor type from the Vendor Type list, either Disbursement Voucher or Refund vendor type. In most cases, you will choose Disbursement Voucher as the vendor type. Refund vendor types are established for one-time payments to UH payees. For example, when an UH event is cancelled, refunds must be given to ticket purchasers. Do not confuse "refund" with "reimbursement", i.e., if you create a vendor code for a student as Refund, KFS will not allow a reimbursement payment to that student on the disbursement voucher. In all cases, if the tax number is available, select Disbursement Voucher as the vendor type as this provides more flexibility in making payment. Example screenshot below.

Is this a foreign vendor - (Required) “No” indicates that the vendor is not identified as foreign. “Yes” indicates that this vendor is identified as foreign and will route the eDoc to the Tax Manager for review. The basis for determining foreign vendor is to first look at the supporting documentation provided.

a. For individuals. Have individuals complete a WH-1, University of Hawaii Statement of Citizenship and Federal Tax Status form. In the WH-1’s Section A. Personal Information, 1. General Information:
i. The individual is not considered foreign if he/she enters “USA” in both the WH-1’s Country of Citizenship and Country of Residence for Tax Purpose fields.

ii. The individual is considered to be foreign if he/she enters a country name other than “USA” in the WH-1’s Country of Citizenship or Country of Residence for Tax Purpose fields.

b. For companies (businesses).

i. If the vendor has a USA address, the vendor is not considered foreign. Obtain from the vendor a W-9, Request for Taxpayer Identification Number (TIN) and Certification (US Entities or Resident Aliens).

ii. If the vendor has a foreign address, the vendor is considered foreign. Obtain from the vendor an IRS Form W-8BEN-E, Certificate of Status of Beneficial Owner for US Tax Withholding and Reporting.

10. Tax Number - This information is required for US vendors and contains nine spaces. The appropriate form should be attached to certify Taxpayer Identification Number (TIN):

a. For US entities: (companies) IRS Form W-9, Request for Taxpayer Identification Number and Certification.


c. For foreign entities: IRS Form W-8BEN-E, Certificate of Foreign Status of Beneficial Owner of United State Tax Withholding and Reporting (Entities).


e. A tax number is not required for Refund vendor types.

f. Although a tax number is not required for foreign vendors, it should be entered into KFS if available for potential tax exemption.

g. The Tax Number field contains sensitive data and will be masked, i.e., only displays the last four digits. Only the Disbursing Vendor reviewers can view the enter tax number.

11. TIN Name – (Optional) The business or personal name from the IRS W-9 tax form. The TIN Name field is used for sole proprietor vendors. (See Special Case – Sole Proprietor for more information on sole proprietors.) This field contains 40 spaces.

12. Tax Number Type - Tax Number Type describes the tax number entered in Tax Number field. Either FEIN (Federal Employer Identification Number) or SSN (Social Security Number) or None. Select "None" only for Refund or foreign vendors. (For foreign vendors, if the tax number is available, enter into KFS and select “FEIN' for foreign company and “SSN” for foreign individual.)

13. Ownership Type - (Required) Examples: Corporation, Non-Profit, and Sole Proprietor. The ownership type is

found on the tax document, i.e., W-9 submitted and certified by the vendor. Example screenshot below.
14. **Ownership Type Category** - The ownership category more specifically identifies the vendor, often indicating the type of services this vendor provides, e.g., Health Care Services or Legal Services.

15. **W-9 Received** – A W-9 will be required for most vendors before they are approved for use. If no W-9 is provided, leave this field blank, i.e., do not enter “Yes” or “No”.

16. **W-8BEN Received** - Certain types of foreign vendors may be required to have a W-8BEN on file before they are approved for use. If no W-8BEN is provided, leave blank, i.e., do not enter “Yes” or “No”. (Other IRS W-8 forms that may be provided by the vendor include W-8BEN-E and W-8EXP.)

17. **Backup Withholding Begin Date** - This field is informational only.
18. **Backup Withholding End Date** - This field is informational only.
19. **Debarred** - For Central Office use only. This designation indicates that the University of Hawaii has been barred from doing business with this vendor by the state or federal government. “Yes” in this field will prevent a requisition to the vendor from being processed. Information in the Notes and Attachments tab will indicate why the vendor was debarred and/or the source of the information.

**Detail Information (Optional)**

(The Disbursing Office will not use this tab. Example screenshot below.)

<table>
<thead>
<tr>
<th><strong>Detail Information</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Payment Terms:</td>
</tr>
<tr>
<td>Pre-Payment:</td>
</tr>
<tr>
<td>Credit Card:</td>
</tr>
<tr>
<td>Taxable Indicator:</td>
</tr>
<tr>
<td>Minimum Order Amount:</td>
</tr>
<tr>
<td>Shipping Title:</td>
</tr>
<tr>
<td>Shipping Payment Terms:</td>
</tr>
<tr>
<td>DUNS Number:</td>
</tr>
<tr>
<td>Vendor URL:</td>
</tr>
<tr>
<td>Confirmation:</td>
</tr>
<tr>
<td>Sold To Vendor Number:</td>
</tr>
<tr>
<td>Sold To Vendor Name:</td>
</tr>
<tr>
<td>Restricted:</td>
</tr>
<tr>
<td>Restricted Date:</td>
</tr>
<tr>
<td>Restricted Person Name:</td>
</tr>
<tr>
<td>Restricted By Principal Name:</td>
</tr>
<tr>
<td>Restricted Reason:</td>
</tr>
<tr>
<td>Remit Name:</td>
</tr>
<tr>
<td>Active Indicator:</td>
</tr>
<tr>
<td>Inactive Reason:</td>
</tr>
</tbody>
</table>

**Address Tab**

The Address tab collects address information for a vendor. There are two types of address types: Purchase Order for mailing purchase orders and Remit for remittance of payments. **However, the Disbursing Office recommends selecting Remit address type for all vendor requests.** At UH, Remit addresses can be used on the
disbursement voucher, requisition, purchase order, and payment request eDocs. The Purchase Order address can only be used on the requisition; so it is not as flexible as the Remit address.

Purchase Order addresses may be added to the vendor record if a different address is used for ordering. The Remit address is the default address when creating a requisition; however, if a Purchase Order address has been added, the address can be changed to select the purchase order address.

Also, if a Purchase Order address has not been added at the time the vendor was created, you can manually overwrite the remit address on the REQ/PO eDoc and enter the desired order address in place of the remit address. (Not to confuse you, please remember, do not overwrite the remit address in the vendor record as there may be payments that are in process.) Example screenshot below.

New Address

1. Address Type – (Required) Select an address type, Remit or Purchase Order. Select Remit as this provides the most flexibility, i.e., can be used on disbursement voucher, requisition, purchase order, and payment request eDocs. Purchase Order addresses can only be used on requisitions. All vendors must have at least one default Remit address. Multiple Remit addresses are permitted.
2. Address 1 – (Required) Enter the first line of the address information. This field is 45 spaces.
3. Address 2 – (Optional) Enter the second line of the address information. This field is 45 spaces.
4. City – (Required) Enter the City name. This field is 45 spaces.
5. State – (Required) Enter the state where the vendor is located: applies to U.S. addresses only.
6. Postal Code - Postal code for this address. This field is 20 spaces.
   a. Required when United States is selected as the Country.
   b. If you receive an error message, “Postal Code Not Found”, submit a trouble ticket with a request to add the postal code to KFS. Provide the City, State and Postal Code in the trouble ticket.
   c. For foreign postal codes, please do not include any space, hyphen, or dashes. For example, Asian postal codes traditionally have a hyphen separating the postal code, e.g., “100-0023”. Please input only the
numbers without the hyphen, e.g., “1000023”. United Kingdom and Canadian postal codes have a space between alphas and numbers, e.g., K1N 0M3. Enter into KFS without any spaces. This postal code in KFS would look like “K1N0M3”.

7. Province - Province name for this address. This is required for Canadian provinces. This field is 45 spaces.

8. Country – (Required) Country where the vendor is located.

9. Attention – (Optional) If applicable, indicates to whom relevant materials should be directed. This field is 45 spaces.

10. URL – (Optional) If applicable, enter the URL associated with a vendor address. This field is 50 spaces.

11. Vendor Fax Number – (Optional) If applicable, enter the vendor fax number. This field is 14 spaces. The fax number should be formatted as ###-###-####.

12. Email Address – (Optional) If applicable, enter an appropriate email address. This field is 50 spaces.

13. Set as Default Address – Check if default address. Every vendor must have one default address.

14. Active Indicator - Click to make the address active. The default selection is active.

15. Click Add to save this address. When done adding this address, you may enter additional addresses. Be aware that if you forget to click the Add button, you will receive a msg: “4 Error(s) Found on Page. Vendors with vendor type of DV must have address type of RM. Address 1 is a required field. Country is a required field.” Click the Add button to add address.

**New Default Address (Set as Campus Default)**

16. **Do not use this tab.** Keep the New Default Address section blank. Do not add or set the campus default. The New Default Address tab appears after the remit address is added.

**Notes and Attachments Tab**

1. Enter any relevant notes or attachments and click Add to add them to the document. For attachments, they must be legible otherwise your request will be disapproved. The preferred format is PDF. Attachments may include:
a. For US individuals. Obtain from the individual and attach a WH-1, *University of Hawaii Statement of Citizenship and Federal Tax Status* form. These are individuals who entered “USA” in both the WH-1’s Country of Citizenship and Country of Residence for Tax Purpose fields.
b. For foreign individuals. Obtain from the individual and attach a WH-1, *University of Hawaii Statement of Citizenship and Federal Tax Status* form. These are individuals who entered a country name other than “USA” in the WH-1’s Country of Citizenship or Country of Residence for Tax Purpose fields. In addition to the WH-1, the following forms should also be attached as applicable. For requests to create foreign vendors, send hard copies of supporting documents to the Disbursing Office.
   i. For all foreign individuals – Electronic I-94, if available from URL: [https://i94.cbp.dhs.gov/](https://i94.cbp.dhs.gov/), or copy of custom’s oval stamp with date of entry in the US on passport page.
   ii. For foreign company - W8-BEN, W-8BEN-E or W8-EXP. (May include US tax number) Also include a copy of the invoice that includes the vendor’s remittance address.
   iii. For J-1 Visa holder - copy of DS-2019.
   iv. For B Visa holder - copy of DISB-45.
   v. For F-1 Visa holder, copy of I-20.
   vi. Copy of IRS Form 8233 if performing services as independent contractor. (IRS Form 8233 used to exempt foreigner from taxes if there is a tax treaty with their country and they possess an US tax number. See IRS Pub 901, US Tax Treaties, for more information.)
c. For US companies. Obtain from the vendor and attach IRS Form W-9, *Request for Taxpayer Identification Number (TIN) and Certification (US Entities or Resident Aliens)*. These are vendors who have a USA address.
   For foreign companies. Obtain from the vendor and attach IRS Form W-8BEN-E, *Certificate of Status of Beneficial Owner for US Tax Withholding and Reporting*. These are vendors who have a foreign address.

2. Invoices. Attach invoices if available. Disbursing’s Vendor Reviewers will use the invoice to verify the remit address. This is because sometimes the address from the IRS Form W-9 is different from the invoice. By attaching the invoice, this may save you from editing and entering another remit address in the future and avoid possible payment delays.

3. **WARNING: DO NOT** click the Save button before adding any supporting attachments or notes. If you do, KFS will “delete” your attachment or notes when you click Submit. If you saved your eDoc prior to adding any attachments, close the eDoc. Then click on the Action List button, find, and open your saved eDoc in your Action List. Then you may attach any attachment or notes and Submit.

4. The vendor eDoc Notes and Attachments tab also works differently from other KFS eDocs.
   a. Due to security reasons, attachment and notes are not viewable from the vendor eDoc. Only the Disbursing Vendor Reviewers are allowed to view all attachment and notes.
   b. The Notes and Attachments tab will incrementally increase as you add attachment and notes. KFS adds a note when the vendor eDoc is created so the tab begins with one (1) note. As you add attachment and notes, the number will increment. So “(2)” signifies that you have added one attachment or note, “(3)” there are two attachment or notes, “(4)” there are three attachment or notes, and so on.
   c. Most KFS eDocs if disapproved will display the disapproval reason in the Notes and Attachments and Route Log tabs. However, the vendor eDoc disapproval reason is ONLY shown in the Route Log tab. So you need to open the Route Log tab to view the disapproval reason.

**NOTE:** Up to this point, we have explained 4 tabs that must be used in the creation of a new vendor. The remaining 11 tabs are either not used or are optional at this time but are shown below for your information. The 11 tabs are: NRA Extended Attributes, Contact, Supplier Diversity, Shipping Special Conditions, Vendor Commodity Codes, Search Alias, Vendor Phone Number, Customer Number, Contracts, Ad Hoc Recipients, and Route Log.
NRA Extended Attributes Tab

(This tab is completed by the Disbursing Tax Manager.)

Changes to the NRA Extended Attributes tab will be reviewed by the Tax Manager. (Note: NRA values will be populated to the PREQ and DV payment Non Resident Alien Tax tabs.)

Contact Tab

(The Disbursing Office will not use this tab.)

The Contact tab collects contact information for a vendor. There are different types of contacts, such as sales, technical, and customer service representatives. Sample of screen is shown below.
Supplier Diversity Tab

(The Disbursing Office will not use this tab.)

The Supplier Diversity tab is used to indicate if any recognized supplier diversity categories apply to this vendor. The Small Business Administration has defined supplier diversity categories that may be based on size (small business), ownership (woman or minority owned), and/or geographical location (local). Sample of screen is shown below.

![Supplier Diversity Tab Screen](image)

Shipping Special Conditions Tab

(The Disbursing Office will not use this tab.)

The Shipping Special Conditions tab is used to indicate whether Accounts Payable is allowed to pay for additional freight charged when the vendor invoices for goods or services, e.g., Radioactive, Hazmat, or Live Animal. Sample of screen is shown below.

![Shipping Special Conditions Tab Screen](image)

Vendor Commodity Codes Tab

(The Disbursing Office will not use this tab.)

The Vendor Commodity Codes tab allows commodity codes to be listed for a vendor. A vendor may be assigned multiple commodity codes. For example, a local company that both prints and designs documents might have two different commodity codes, one for printing and one for design. Sample of screen is shown below.

![Vendor Commodity Codes Tab Screen](image)
Search Alias Tab

(The Disbursing Office will use this tab when necessary.)

Search Alias tab is used to define other names that may be used when searching for this vendor. Example screenshot below.

(Note: Vendor #20151-0 “INTL READING ASSN”. Without an alias, if a user searched for this vendor and typed “Inter*” or “*Reading Assoc*”, KFS would not return any results. To make the search easier, an alias was created “INTERNATIONAL READING ASSOCIATION”. Now with the alias, the user may search with wildcards by entering “Inter*” or “*Reading Assoc* and KFS will return vendor INTL READING ASSN. See search result in screenshot below.)

Vendor Phone Number Tab
(The Disbursing Office will use this tab when necessary.)

The Vendor Phone Number tab collects phone numbers for this vendor. It may be used to define various types of phone numbers. Phone numbers should be entered as ###-###-#####. Sample of screen is shown below.

![Vendor Phone Number Tab](image)

**Customer Number Tab**

(The Disbursing Office will not use this tab.)

The Customer Number tab collects information about numbers the vendor uses to identify University of Hawaii as a customer. Sample of screen is shown below.

![Customer Number Tab](image)

**Contracts Tab**

(The Disbursing Office will not use this tab.)

The Contracts tab collects information about contracts with our vendors. It includes information such as who manages the contract for your institution, when it begins and ends, any special payment or shipping terms that may specifically apply to the vendor. However, the Contracts tab is viewable only by the members of the KFS-PURAP Purchasing Processor role. Sample of screen is shown below.
Ad Hoc Recipients Tab

You may use Ad Hoc routing to route the vendor eDoc to another person or group in addition to the normal routing. Remember however, that each time the vendor eDoc is routed to another approver it increases the time to final approval.

1. Action Requested - Prior to submitting the eDoc, your options are: FYI, Approve, or Acknowledge. Approve means action is requested to approve or disapprove and until one of these actions is completed, the eDoc will not route to the next approver. FYI can be cleared from the results page of the individual’s action list, Acknowledge action requires the eDoc to be opened and viewed; neither the FYI nor the Acknowledge will hold the vendor eDoc from moving forward however. After the eDoc is submitted, you can still ad hoc route your eDoc but your options will only be FYI and Acknowledge; you no longer have Approve as an option.
2. Person - Select from the lookup.
3. Action - Click Add to complete action and select a person.

Route Log Tab
View the route log to find where your eDoc is in the approval routing. Click on the “show” button for additional information about a particular action. Remember if Disbursing disapproves your request for vendor maintenance, the disapproval reason will be displayed here in the Route Log tab and not in the Notes and Attachments tab.

Actions Taken - View the actions that have already been taken.

Pending Action Requests - View the Pending Action Request(s).

Future Action Requests - View the Future Action Request(s).

**Buttons**

When initiating a vendor eDoc the following buttons will appear:
1. Click the Submit button to route for approval
   a. Route to Vendor Approver – FYI returned to initiator when approved/disapproved
2. Click the Save button to continue editing in the future
3. Click the Close button to close the eDoc
4. Click the Cancel button to cancel the eDoc

If the Vendor eDoc is in **your Action List** the following buttons will appear:

- send ad hoc request
- save
- reload
- blanket approve
- approve
- disapprove
- close

5. Click the Send Ad Hoc Request button to send the ad hoc route request.
6. Click the Save button to save your document and continue editing in the future.
7. Click the Reload button to refresh your page after submission so that you can see the new status of your document. Reload will load the document from the last saved version.
8. Click Blanket Approve if you have the authority to approve for all pending approvers.
9. Click the Approve button to approve the Vendor eDoc and send to the next routing level, an FYI will be sent to the initiator when the eDoc is fully approved (FINAL).
10. Click the Disapprove button to disapprove the Vendor eDoc and FYI will be sent to the initiator.
11. Click the Close button to close the eDoc.

If the Vendor eDoc is in **DISAPPROVED** or **FINAL** status the following buttons will appear:

- send ad hoc request
- close

12. Click the Send Ad Hoc Request button to send the ad hoc route request.
13. Click the Close button to close the eDoc.

---

**Editing an Existing Vendor**

When you retrieve a vendor, you will see “edit” and “create division” in the Vendor Lookup screen’s Actions column. In the screenshot below, a tax number was used to search and find vendor 17051-1, Dept of Education. This vendor is considered the “parent” because in the Actions column, you’ll find the Edit and Create Division options. The Create Division option is only available for the “parent” vendor. All vendor records may be edited. (See arrows.) This vendor has one parent and 180 children. We’ll start with the create a Division, then Edit a vendor...
Create a Division

Division refers to group entities under the same corporate office with the same Tax Number (parent vendor). This feature might be used to add information about separate divisions or branches without having to duplicate the corporate information. This option is available only for parent vendors, i.e., vendors for which the Vendor Parent Indicator on the vendor tab is set to “Yes”. A Division will normally have a different name from the parent.

**Note:** In order to be recognized as a Division, the child must use the same tax number as the parent.
From the Vendor Lookup search results screen, click Create Division. You should see the screen below. In this example, we’re adding the “Alan Kimura Elementary School” as a division to its parent, Dept of Education.
1. Description – (Required) you must always enter a description. Use naming convention for Division: FO #-DIV Vendor Name or Vendor #. In this example, you can use either 060-DIV DEPT OF EDUCATION or 060-DIV 17051-1.
2. Keep Parent Indicator set at “No”. This will create a division of the parent you selected on the search results.
3. Enter the vendor's name in the appropriate name field and then go to the Address tab.
4. Enter the Division’s address information in the Address tab.
5. Click Add to add the address.
6. Click Submit to route to the Vendor Reviewer.

---

**Edit a Vendor**

In most cases, to Edit a vendor is to add a new, more current address. When the Edit link is clicked, KFS will show side-by-side the vendor’s “old” and “new” information. Users should use the new side to add new addresses. Currently, Disbursing is allowing “small” changes to an existing address such that a new address doesn’t need to be added. For example, if the address change is only to add an apartment or suite number, go to the existing address and only add the apartment or suite number. In this case, adding a new address is not necessary. For new addresses that are different than the old address, add a new address instead of changing the existing address.

To begin a vendor edit, search for the vendor. In this example, we again used Dept of Education and search by its Tax Number.
From the Vendor Lookup search results screen, click Edit under the Actions column. Click on Edit. You should see the screen below. In this example, we’re adding a new address for the “Alan Kimura Elementary School”. The new address is “123 PUHEO ST, HONOLULU, HI 96816”.
## Document Overview

### Old
**Vendor #:** 17051-172  
**Vendor Parent Indicator:** No  
**Vendor Parent Name:** DEPT OF EDUCATION  
**Vendor Name:** ALAN KIMURA ELEMENTARY SCHOOL  
**Vendor Last Name:**  
**Vendor First Name:**  

### New
**Vendor #:** 17051-172  
**Vendor Parent Indicator:** No  
**Vendor Parent Name:** DEPT OF EDUCATION  
**Vendor Name:** ALAN KIMURA ELEMENTARY SCHOOL  
**Vendor Last Name:**  
**Vendor First Name:**  

### Corporate Information
**Vendor Type:** DISBURSEMENT VOUCHER  
**Is this a foreign vendor:** No  
**Tax Number:** *****6482  
**TIN Name:** DEPT OF EDUCATION  
**Tax Number Type:** FEIN  
**Ownership Type:** GOVERNMENT  
**W9 Received:**  
**W-8BEN Received:**  
**Backup Withholding Begin Date:**  
**Backup Withholding End Date:**  
**Debarred:**  

### Payment Terms

### Address
**New Address**

- **Address Type:** REMIT  
- **Address 1:** 123 PUHEO ST  
- **City:** HONOLULU  
- **State:** HI  
- **Postal Code:** 96816
1. Description - (Required) you must always enter a description. Use naming convention for Edit: FO #-EDIT Vendor Name or Vendor #. Example: 060-EDIT ALAN KIMURA ELEMENTARY SCHOOL or 060-EDIT 17051-172.

2. Edit the vendor information on the right hand column of the eDoc called "NEW".

3. If you are adding a new address, enter the new address information into the New Address section.

4. If the new address should now be the default, set this new address as the Default Address “Yes” and click the Add button to add the address. If you are adding several new addresses, ensure you flag one address as the Default address. You can only have one default Remit address.

5. Also, keep the New Default Address section blank.
6. You may need to change the old address’ Default Address to “No” if it is no longer the default.
7. Do not overwrite the “old” address as payment eDocs may be in process.
8. For the new address, please leave the Active Indicator box checked, i.e., do not uncheck this box. By saying this is the active address, this is the address that will be displayed when you create DV or requisitions.

Special Case – Sole Proprietor

The IRS defines a sole proprietor who is someone who owns an unincorporated business by himself or herself. Sole proprietors are identified when they check the box on the IRS Form W-9 identifying themselves as a "sole proprietor". The following three examples show how to create a vendor maintenance eDoc for sole proprietors based on information received from the vendor on the IRS Form W-9.

Example #1 Vendor wants his name printed on the check.

In this case, the payee’s name, JOHN Q PUBLIC, will be printed on the check.

The W-9 displays:

1. Name: Joe Q. Public
2. Business Name: Joe’s Appliance Service
3. Tax Classification: Individual/Sole Proprietor
4. Taxpayer Identification Number: 555-55-5555 (SSN)
Based on the W-9 with SSN, enter data into the vendor maintenance fields:

5. **Vendor Last name:** Public.
6. **Vendor First Name:** Joe Q
7. **Tax Number:** 555555555
8. **TIN Name:** (Blank)
9. **Ownership Type:** Individual/Sole Proprietor
10. **(OPTIONAL) Alias tab->Search Alias Name:** Joes Appliance Service.
**Example #2**  Vendor wants his Business Name printed on his check

In this case, the payee’s name, JOES APPLIANCE SERVICE, will be printed on the check.

The W-9 displays:

11. **Name:** Joe Q. Public
12. **Business Name:** Joe’s Appliance Service
13. **Tax Classification:** Individual/Sole Proprietor
14. **Taxpayer Identification Number:** 99-5678901 (EIN)
Based on this W-9 with EIN, enter in the vendor maintenance fields:

15. **Vendor Name:** JOES APPLIANCE SERVICE  
16. **Tax Number:** 995678901  
17. **TIN Name:** (Blank)  
18. **Ownership Type:** Individual/Sole Proprietor  
19. **(OPTIONAL) Alias tab->Search Alias Name:** PUBLIC, JOE Q.
Example #3  Vendor wants his checks addressed to his business name
(Even though a SSN is displayed on the W-9, the vendor wants his checks addressed to his business name. This W-9 is identical to the one used in Example #1.)

In this case, the payee’s name, JOES APPLIANCE SERVICE, will be printed on the check.

The W-9 displays:
20. **Name**: Joe Q. Public
21. **Business Name**: Joe’s Appliance Service
22. **Tax Classification**: Individual/Sole Proprietor
23. **Taxpayer Identification Number**: 555-55-5555 (SSN)
Based on the W-9 with SSN, enter data into the vendor maintenance fields:

24. **Vendor Name:** JOES APPLIANCE SERVICE  
25. **Tax Number:** 555555555  
26. **TIN Name:** PUBLIC, JOE Q.  
27. **Ownership Type:** Individual/Sole Proprietor
**Document Overview**

**Description:** 066-NEW Joe's Appliance Service

**Organization Document Number:**

**Explanation:** New vendor Joe's Appliance Service, Sole Proprietor.

---

**Vendor**

**New**

**General Information**

- **Vendor #:**
- **Vendor Parent Indicator:** Yes
- **Vendor Name:** JOES APPLIANCE SERVICE
- **Vendor Last Name:**
- **Vendor First Name:**

**Corporate Information**

- **Vendor Type:** DISBURSEMENT VOUCHER
- **Is this a foreign vendor:** No
- **Tax Number:** 555555555
- **TIN Name:** PUBLIC JOE O
- **Tax Number Type:** Fein
- **Ownership Type:** INDIVIDUAL/SOLE PROPRIETOR
- **Ownership Type Category:**
- **W9 Received:** Yes
- **W-8BEN Received:**

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Process Document – Vendor Maintenance

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KFS Vendor Business Rules

1. Either Vendor Name or Vendor Last Name and Vendor First Name fields must be completed.
   a. Vendor Name must be the Company Name and not an individual’s name.
   b. If Vendor Name field is entered, Vendor First Name and Vendor Last Name fields must be blank.
   c. If Vendor First Name and Vendor Last Name fields have been entered, the Vendor Name field must be blank.

2. Tax number must be 9-digits and cannot be all zeroes (000-00-0000) or all 9’s (999-99-9999).
   a. The first three digits of an SSN cannot be '000'.
   b. The middle two digits of an SSN cannot be '00'.
   c. The last four digits of an SSN cannot be '0000'.
   d. The first two digits of a FEIN cannot be '00'.
   e. The vendor's Tax Number must be unique unless it is a Division of a parent vendor.

3. Vendors of type 'Disbursement Voucher' must have an address of the type 'Remit'.
   a. A vendor must have one and only one address marked as a default remit address.
   b. If a country for an address is 'United States' then state and postal code are required.

4. Phone and fax numbers must be formatted as ####-####-####.
Vendor Name/Address Conventions

Name Field

1. Vendor/Payee names are established according to order forms, invoices or other documentation. Vendor name is limited to 45 characters. Common words are abbreviated rather than words crucial to recognizing the official business name.

   Common words are uniformly abbreviated even if the full vendor name is within the 45 character limitation. Refer to the list of Common Abbreviations for vendor names and addresses listed below.

   **Note:** In some exceptional situations, when the vendor name is extremely long, additional word abbreviations may be required to meet the 45 character limitation.

   **Note:** IRS limits 40 spaces for reporting 1099 and 1042 vendor names.

2. If a vendor name begins with "a", "an", or "the", these words are omitted:

   **Vendor Name Is:** The Durham Print Shop
   **Reflected In Vendor File As:** VendorName: DURHAM PRINT SHOP

3. If "a", "an", "the" are within a name that exceeds 45 characters, these words are omitted:

   **Vendor Name Is:** American Association of the Lab Animal Science
   **Reflected In Vendor File As:** VendorName: AM ASSN OF LAB ANIMAL SCIENCE

4. Commas, apostrophes, periods, and slashes are not used in the name field.

   **Vendor Name Is:** Al's Carpet Center
   **Reflected In Vendor File As:** VendorName: ALS CARPET CTR

   **Vendor Name Is:** A/1 Lock and Key Service
   **Reflected In Vendor File As:** VendorName: A1 LOCK & KEY SRVC

5. Hyphenated Names are entered as two units. A space is used in place of the hyphen.

   **Vendor Name Is:** Mary Case-Brown
   **FirstLastName:** MARY CASE BROWN

   **Vendor Name Is:** Liliha X-Ray Service
   **VendorName:** LILIHA X RAY SRVC

6. Signs are used if it is accepted as part of the vendor’s name.

   **Vendor Name Is:** @
   **VendorName:** @ ONCE

   **Vendor Name Is:** +
   **VendorName:** A + WELDING

   **Vendor Name Is:** #
   **VendorName:** R & R #2

   **Vendor Name Is:** .com
   **VendorName:** CLICKSMART.COM INC

7. Ampersand "&" is used in place of "and":

   **Vendor Name Is:** American Telephone and Telegraph
   **VendorName:** AT & T

8. Initials of the vendor are established if directed by the vendor’s remittance invoice. Spaces are not used to separate initials.

   **Vendor Name Is:**
   **Reflected In Vendor File As:**
W W Grainger ........................................................................ VendorName: WW GRAINGER

9. Vendor acronym name will be spelled out in the Vendor Table if available.
   Vendor Name Is: Reflected In Vendor File As:
   ASCE ................................................................. VendorName: AM SOC OF CIVIL ENGINEERS

   Acronyms are added to the vendor file when the vendor is only using its acronym name and does not
   indicate what the acronym represents.
   Vendor Name Is: Reflected In Vendor File As:
   ISCH ................................................................. VendorName: ISCH

10. Prefixes such as De, Du, La, Los, Mac, Mc, San, Van, O, are included as part of the last name with no
    space separation.
    Vendor Name Is: Reflected In Vendor File As:
    Michael Van Sickle .............................................. FirstName: MICHAEL VANSICKLE
    Paul Mc Adams .................................................... FirstName: PAUL MCADAMS
    Mary O'Hara ....................................................... FirstName: MARY OHARA

11. Mr., Mrs., Ms., Miss, Dr. or professional credentials are not reflected.
    Vendor Name Is: Reflected In Vendor File As:
    Mrs. Jane Long ..................................................... FirstName: JANE LONG
    Dr. Ryan Iwamoto .................................................. FirstName: RYAN IWAMOTO
    David Logan M D .................................................. FirstName: DAVID LOGAN
    Maryann Ishikane R N .......................................... FirstName: MARYANN ISHIKANE

    Exception: Professional credentials are used if it is part of the corporate name.
    Vendor Name Is: Reflected In Vendor File As:
    Frank A. Farren M. D. Inc ................................. VendorName: FRANK A FARREN MD INC

12. Alias names may be established when a vendor is recognized under more than one name. Vendor
    search can be performed on either name to locate the record.
    Vendor Name Is: Reflected In Vendor File As:
    President Theodore Roosevelt High School ..........VendorName: PRES THEODORE ROOSEVELT HI SCH

    Vendor Name Is: Reflected In Alias File As:
    Roosevelt High School .........................................VendorName: ROOSEVELT PRESIDENT THEODORE

13. Alias names may also be established if a vendor name is extremely long and the abbreviated version
    appears difficult to recognize (need to abbreviate words not normally abbreviated). The alias name will
    be reflected using the list of common word abbreviations, then truncated at the 45 character limit.
    Vendor Name Is: Reflected In Vendor File As:
    National Federation of Community Broadcasters ......VendorName: NATL FED OF COMMU BRDCSTR

    Reflected In Alias File As:
    VendorName: NATL FEDERATION OF COMMUNITY BROADCASTERS
**Address Field**

1. Order and remittance addresses are established according to order forms, invoices or other documentation. Two (2) address lines are available, each limited to 45 characters. Common words are abbreviated rather than words crucial to recognizing the official order and remittance addresses.

   **Common words are uniformly abbreviated** even if the full vendor address is within the 45 character limitation.

   Refer to the attached listing of common word abbreviations for vendor addresses.

2. Commas, apostrophes, and periods are not used in the address field.

   **Address is:**  
   P.O. Box 398 ................................................................. PO Box 398

3. The Post Office reads an address from bottom to top. Therefore, the lower lines will include the most important address information (i.e., PO Box, street address). Attention, in care of, suite number, room number, apartment number, Doing Business As (DBA), and other designations (schools, departments) will be reflected on the top address line.

4. City, state, country, and zip codes are separate fields.
   a. Standard two-letter state abbreviations are used.
      **Address is:**  
      Hawaii ................................................................. HI

   b. Standard two-letter foreign country abbreviations are used.
      **Address is:**  
      Canada ................................................................. CA

   c. For US, 9-digit postal codes will be used whenever available; otherwise 5-digit postal codes will be used.
Common Abbreviations

These abbreviations are used when creating vendors, whether or not the entire name or address line exceeds the 45 space limitation.

A. Name

American - AM
associates - ASSOC
and - &
association - ASSN
building - BLDG
center/centers - CTR
committee - COMM
company - CO
corporation - CORP
council - COUN
department - DEPT
division - DIV
incorporated - INC
institute - INST
institution - INSTN
international - INTL
journal - JRNL
laboratory/laboratories - LAB
limited - LTD
manufacturing - MFG
national - NATL
service/services - SRVC
society - SOC
United States - US
university - UNIV

B. Address

apartment - APT
attention - ATTN
avenue - AVE
boulevard - BLVD
building - BLDG
center - CTR
circle - CIR
court - CT
department - DEPT
drive - DR
floor - FLR
highway - HWY
in care of - C/O
lane - LN
loop - LP
number - # or NO
parkway - PKWY
place - PL
post office box - PO Box
road - RD
room - RM
route - RTE
rural route - RR
station - STN
street - ST
suite - STE