



What Do I Need to Attach to a Purchasing E-form?

Attaching supporting documents is required when submitting a purchasing E-form. Below is a list of the types of information that maybe required for each of the forms.

Direct Payment E-Form attachments

- [W-9 form](#) – required before payment may be processed, if the vendor is not in the Research Foundation system.
- Receipt(s) or Invoice with the
 - Legal name and full address of the vendor or individual to be paid
 - The date of service or purchase
 - Full description of the service or purchase
 - The amount to be paid
- If payment is for a meeting where food is provided:
 - Include a list of the attendees
 - Description meeting purpose or agenda

Independent Contractor E-Form

- [W-9 form](#) – required before payment may be processed, if the vendor is not in the Research Foundation system.
- [Working Relationship Form](#)
- Invoice from the Contractor/company
- [ACH form](#) (not required, but preferred)

Participant Stipend E-Form

- [W-9 form](#) – required before payment may be processed, if the participant is not in the Research Foundation system.
- [ACH form](#) (not required, but preferred)



THE RESEARCH FOUNDATION
The State University of New York

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Research Foundation E-forms**

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Purchase Requisition E-Form

- [W-9 form](#) – required before payment may be processed, if the vendor is not in the Research Foundation system.
- Quote for the merchandise or services requested, including legal name and address of the vendor, detailed description of items/services, cost.
- Purchases greater than \$50,000 are required to follow the Research Foundation Bids and Proposals Policy, contact the [Sponsored Programs Accounts Payable/Purchasing Services Office](#) for details.