

RACINE COUNTY ADDRESS BOOK GUIDELINES

RULES:

1. Search the system for a vendor before attempting to add a new one. Keep these guidelines in mind while searching to avoid duplicate vendors. If a vendor is in the system, but the address is different, only an address change may be required rather than a new vendor. **NOTE:** Documentation is required for adding new vendors to the system. Allowable documentation includes a W9 or an invoice.
2. If the vendor is the same but there is a new remit name and address, change the name and address to reflect the current information. (Ex: Vendor Number: 12713 - County Treasurer Association, Paul Smith 730 Wisconsin Ave is now sending an invoice as follows County Treasurer Association, Mickey Mouse, 1234 Disney Lane. Vendor 12713 would be changed to COUNTY TREASURER ASSC, MICKEY MOUSE, 1234 DISNEY LANE.)
3. All items must be entered into the Address Book in Capital Letters. All vendors must include an address.
4. If the vendor is an employee their **home** address is required to be used. HR will provide employee address changes to Finance for address book corrections.
5. Vendor alpha name is limited to 50 characters and must be exactly the same. See Appendix A for acceptable abbreviations. Any abbreviations not listed in Appendix A should not be used or should be cleared with Finance first. If a vendor name is longer than 50 characters, the second line name field allows for many more characters and can therefore be used for the full name.
6. The only acceptable punctuation is a comma between the last and first names of an individual and as necessary per guidelines #8 and #9 below. All other punctuation, such as dashes, ampersands, apostrophes, etc, will not be used. (Ex: St. Luke's Hospital would be entered as ST LUKES HOSPITAL.)
7. Names with spaces in between letters will be compressed to remove the extra spaces. (Ex: Mc Gregor would be entered as MCGREGOR)
8. A vendor name which includes a County, City, or State will be written up with the County, City, or State's name first. (Ex: City of Rochester Police would be entered as ROCHESTER, CITY OF POLICE.) This applies only to Governments and related groups, not to Businesses.
9. Business names that begin with THE will be entered under the second word of the name. (Ex: The Home Depot would be entered as HOME DEPOT, THE.) Similar rules apply for estates and trusts. (Ex: Estate of Bob Smith would be entered as SMITH, BOB, ESTATE OF.)
10. Vendor names that contain an individual's name will **not** be treated like an individual by placing the last name first. (Ex: George G. Haumerson Company would be entered as GEORGE G HAUMERSON COMPANY.)
11. Professionals must be entered as their firm or clinic if they are using that Tax ID number for reporting purposes. If they are using their own Social Security number

then the individual is to be entered as an individual per #6 above. (Ex: Joe Smith MD using the Tax ID of the clinic would be entered as the clinic, but Joe Jones MD using his Social Security number would be entered as JONES, JOE MD.)

12. A Tax ID/Social Security number must be entered for every new vendor. When entering the tax number do not enter the separating “-“, the system automatically applies them to the proper space based on the Tax Code. The SSN field will be used for individual social security numbers and the FID field will be used for businesses federal tax ID number.
13. Vendor addresses should list the street address (including suite #) on the first line and then the PO Box address on the following line.
14. Any time a change is made to a vendor, the reason for the changes and the date they occur must be recorded in the Note Section that is attached to the vendor. This will allow others to see when, why, and by whom changes have been made.
15. When a W9 (or other supporting documents) are available, they will be scanned and linked to the vendor.

APPENDIX A – ALLOWABLE ABBREVIATIONS FOR ADDRESS BOOK

Allowed Abbreviation	What the abbreviation stands for
INC	INCORPORATED
CORP	CORPORATION
ASSC	ASSOCIATION
EXT	EXTENSION
ATTY	ATTORNEY
DR	DOCTOR
CO	COUNTY
DEPT	DEPARTMENT
HR	HUMAN RESOURCES
AVE	AVENUE
ST	STREET
LN	LANE
WI	ANY STATE 2 LETTER ABBREVIATION IS ALLOWED

COMMON WISCONSIN GOVERNMENT AGENCIES – ALLOWABLE ABBREVIATIONS

Abbreviation	Agency
WI DCF	DEPT OF CHILDREN AND FAMILIES
WI DEM	DEPT OF EMERGENCY MANAGEMENT
WI DHFS	DEPT OF HEALTH AND FAMILY SERVICES
WI DHSS	DEPT OF HEALTH AND SOCIAL SERVICES
WI DILHR	DEPT OF INDUSTRY LABOR AND HUMAN RELATION
WI DNR	DEPT OF NATURAL RESOURCES
WI DOA	DEPT OF ADMINISTRATION
WI DOC	DEPT OF CORRECTIONS
WI DOJ	DEPT OF JUSTICE
WI DOR	DEPARTMENT OF REVENUE
WI DOT	DEPT OF TRANSPORTATION
WI DPI	DEPT OF PUBLIC INSTRUCTION
WI DWD	DEPT OF WORKFORCE DEVELOPMENT
WI ETF	DEPT OF EMPLOYEE TRUST FUNDS
WRS	WISCONSIN RETIREMENT SYSTEM