UCPS
UNION COUNTY PUBLIC SCHOOLS

VENDOR MASTER FILE RECORD DATA FORM

In order to comply with the Internal Revenue Service (IRS), we are required to gather information for each entity to whom UCPS makes a payment. Failure to provide this info may result in payments subject to 28% backup withholding and penalties by the IRS. ***This form is for U.S. persons/entities only. If you are a foreign person/entity, complete IRS Form W-8BEN/W-8BEN-E.***

Vendor Name:_____(as shown on your tax return)
dba if applicable:_____(if different from above)
SSN/TIN/EIN:_____

W-9 Designation (Check one - should match signed W-9 form)

- ☐ Individual/Sole Proprietor
- ☐ Single Member LLC
- ☐ Partnership
- ☐ Trust/Estate
- ☐ Non-Profit
- ☐ Other: _____
- ☐ C Corp
- ☐ S Corp
- ☐ LLC taxed as C Corp
- ☐ LLC taxed as S Corp
- ☐ LLC Taxed as Partnership

Scope of Work (select all that apply):

- ☐ Services - explain: _____
- ☐ Award, Honorarium, Prize or Stipend
- ☐ Attorney, or for Legal Settlements
- ☐ Rental Payments
- ☐ Employee
- ☐ Healthcare

***ALL VENDORS MUST ANSWER YES OR NO TO ALL SECTIONS BELOW:**

☐Y ☐N Are you a non-state resident business entity/individual (this applies to all W-9 designations above)?
☐Y ☐N **(NOT based in North Carolina)** Is the work being performed in North Carolina?
☐Y ☐N Is your work in connection to a performance, an entertainment or athletic event, a speech or creation of a film, radio or television program? **(if yes, circle applicable one)**
☐Y ☐N Are you a licensed member of clergy, a nonresident entity with NCDOR exemption **(must provide documentation)**, a corporation or LLC with North Carolina Secretary of State Certificate of Authority and identification number **(must provide documentation)** or an exempt organization under G.S. 105-130.11?

If answer to questions 1-3 is YES and question 4 is NO, 4% of all applicable payments will be withheld over $1500 total (per calendar year).

HUB INFORMATION (Historically Underutilized Business):

Type of Business:

- ☐ Disabled
- ☐ Emerging Small
- ☐ Non-Profit
- ☐ Small Disadvantaged
- ☐ Veteran
- ☐ Women-Owned

Ethnicity:

- ☐ African-American
- ☐ Asian-American
- ☐ Hispanic-American
- ☐ Native-American
- ☐ Non-Applicable
- ☐ Other -_____

Size of Business:

- ☐ Small _____# of Employees - 1 to 50
- ☐ Large _____# of Employees - over 50

Will you accept payment through VISA NETWORK?

- ☐ Yes
- ☐ No

Fax completed form to:
Purchasing Department
704.283.1657

Email:
purchasing@ucps.k12.nc.us
or
Mail to:
UCPS
Purchasing Department
307 East Jefferson Street
Monroe, NC 28112

ORDER ADDRESS (REQUIRED):

Address 1:_____
Address 2:_____
City, State, Zip:_____
Phone:_____ **Fax:**_____
Contact Name:_____
Corporate E-Mail:_____
Ordering E-Mail:_____

REMIT ADDRESS: (REQUIRED)

Address 1:_____
Address 2:_____
City, State, Zip:_____
Phone:_____ **Fax:**_____
Contact Name:_____
E-Mail:_____
Website:_____

CERTIFICATION (Signature, not typed name, is required):

Under penalties of perjury, I certify that (1) the number shown above is my correct taxpayer identification number, (2) I am not subject to backup withholding because (a) I am exempt from backup withholding, or (b) I have not been notified by the IRS that I am subject to backup withholding; (3) I am a U.S. person (including a U.S. Resident Alien); and (4) the information provided is complete and accurate as of this date.

Signature:_____ ***Date:***_____
Printed Name:_____

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In order to comply with Internal Revenue Service (IRS) regulations, we are required to obtain your Social Security Number (SSN) or Federal Tax Identification (TIN/EIN) to satisy IRS Form 1099 reporting requirements. Failure to provide this information may subject all payments made to you to the 28% backup withholding as required by the IRS. Please complete the attached vendor master file form and enter all appropriate information. The information provided will be used to help determine tax compliance with 1099s. Certain payments over $600.00 may result in issuance of 1099 to the vendor.

4% NC Withholding on Nonresident Personal Services:
North Carolina GS 105-163.1 and GS 105-163.3 requires income tax to be withheld at the rate of 4% from payments of more than $1,500.00 paid during a calendar year to nonresident individuals or nonresident entities for personal services performed in North Carolina in connection with a performance, an entertainment or athletic event, a speech, or the creation of a film, radio, or television program. Additionally, NC requires income tax to be withheld at the rate of 4% from payments of more than $1,500.00 paid during a calendar year to ITIN contractors for services provided within the State. See NC-30 for additonal information.

Examples of Services Subject to 4% withholding:

- Performances
- Concerts/entertainment
- Athletic Event
- Speeches - any speech that amuses, entertains, or informs is subject to the withholding requirement. This includes instructors at seminars that are open to the public for an admission fee or are for continuing education.
- Creation of a film, radio or TV program
- All services performed by an ITIN holder/contractor

Who is subject to the NC 4% withholding:

- Nonresident Contractors
- Nonresident Entities
- ITIN Holders

If you have any questions regarding how to complete the attached form, please contact the UCPS Purchasing Department either by email at purchasing@ucps.k12.nc.us.