**To**: Enphase Accounts payable, Tiana Kammer, Loann Nguyen, Annette Roth, Maria Kendall, Chantal Holvoet-Delaere, Courtney Pastrick, Warren Eik, Nitish Mathur

**From**: Dharshan Shan, Sr. Associate, Accounting

**Memo No:** Sdharshan3

**Subject**: **Modification/Change in** **Vendor Request Form and Vendor Creation Instructions.**

**Last Updated**: Dec 03, 2019

**CC:** Mary Erginsoy, Sr. Director and Corporate Controller

Anton Badra, Sr. Manager, Accounting

Preet Singh, Manager, SEC Reporting and Technical Accounting

**Purpose & Scope:**

This Memo documents the changes made in Vendor Request form (“VRF”) and Vendor Creation Instructions.

* Excel VRF changed to editable PDF
* Elimination of buyers’ checklist
* Detailed vendor creation instructions
* Instructions to fill the W-8BEN & W-8BEN-E form and their benefits

Scope: The Changes in VRF and Vendor Creation Instructions are for all regions excluding India.

**Rationale:**

The completed VRF must be returned in a non-editable format to ensure accuracy of the data, protect document from unwarranted changes, as well as meet SOX requirements.

*Issues identified*:

1. Completing excel VRF form and converting it in non – editable PDF format was time consuming
2. Vendors had difficulties submitting the completed VRF form in right PDF format
3. Vendors had difficulties submitting the correct tax certificates or forms

*Solution proposed*:

1. VRF has been changed from excel to editable PDF to ease the vendor’s process of completing the document.
2. Merging information required per Buyers Checklist into VRF as *Internal Use Only* section, thus eliminating Buyers Checklist
3. Internal use only section to be completed by the Requestor before submitting it to Vendor Master team

**Vendor Creation Instructions.**

**Summary:**

Below process summarizes the steps to be followed for smooth and quick setup of new vendor/installer or modification to the existing vendor/installer in Oracle.

**For setting up or changes to a Vendor in Oracle**

1. Requestor to select Vendor Request Form (“VRF”) specific to the operating unit in which vendor is to be created. Refer **Appendix A** for forms.
2. Requestor should ensure, VRF has been completed, dated and signed by the Vendor. Any field which is not applicable should be marked as *Not Applicable or N/A*.
3. Completed VRF should be returned to Vendor Master team by Requestor or vendor via email to [Vendormaster.AP@enphaseenergy.com](mailto:Vendormaster.AP@enphaseenergy.com).
4. Requestor should ensure mandatory supporting tax documents are submitted along with the VRF to the Vendor Master team.
   * *US Vendors* – W-9 tax certificate
   * *EMEA Vendors* – VAT number along with VAT certificate or a screenshot from government website.
   * *Australia Vendors* – GST/ABN number along with tax certificate
   * *New Zealand vendors* - GST/NZBN number along with tax certificate
5. Where tax certificate is not available from the vendor, Requestor can inform vendor where they can verify their tax ID numbers using the below website specific to each region.
   * *VAT (EMEA):* <http://ec.europa.eu/taxation_customs/vies/vatRequest.html>
   * *ABN (Australia):* <https://abr.business.gov.au/>
   * *NZBN (New Zealand):* <https://www.gs1nz.org/sectors/government/nzbn/>

**For setting up a Non-US vendor in US Entity**

In addition to the VRF, Form W8-BEN (for individuals) or W8-BEN-E (for entities) is required to be completed and signed. W-8BEN is an important tax document which allows businesses operating outside of the U.S to claim tax exemption on U.S.-sourced income. Refer **Appendix B** for instructions on completing W8-BEN form.

**Appendix A**

EMEA Operating Unit (Netherland and France) - OPS-00058-v3.0\_New Vendor Request Form\_EMEA



US Operating Unit - OPS-00058-v3.0\_New Vendor Request Form\_US



ANZ Operating Unit (Australia and New Zealand) - OPS-00058-v3.0\_New Vendor Request Form\_ANZ



**Appendix B**

