- ○ **ACCOUNTING DOCUMENTS**
  - ▪ **Adding W-9**
    - • **Step 1** – Click on the "Add" button.

Step 2 – Enter the "Legal Entity Name" that appears on the W-9. Be careful not to enter the DBA in this field. If you have a DBA, it is optional to fill out. Select the "Identification Type". Enter the "TAX Identification #". Select the "Federal Tax Classification". Check the 2 boxes to acknowledge the conditions. Click the "Save" button.

Click the "OK" button. This will take you to the DocuSign page to fill out the W-9.

- **Step 3** – Click the Checkbox and select the Continue button

- **Step 4** - Select "Sign". Then, the "Finish" button.
  This will upload the W-9 to your VMS profile for VRM to approve.