<u>Adding AP forms to HUB page</u>

From left sidebar menu, select Edit Content

Select Add Card

Select Add Card From Library

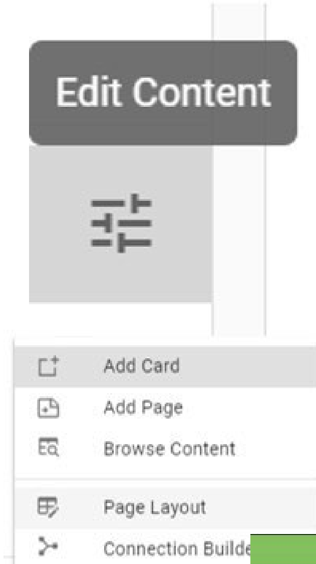
In Top left search bar enter FCOH

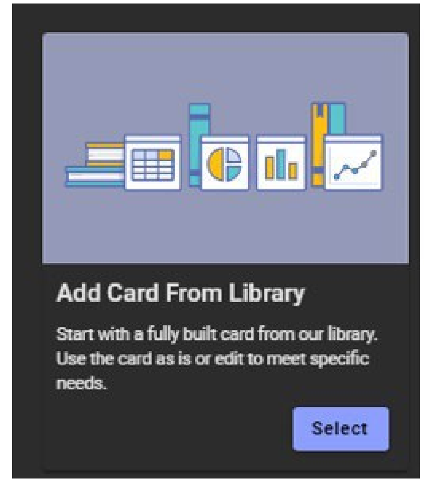
FCOH AP Forms card appears →Select Card

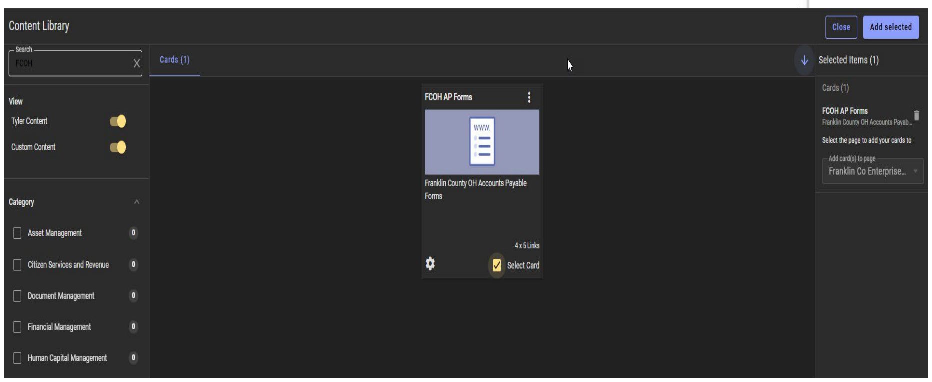
Select Add Selected in top right

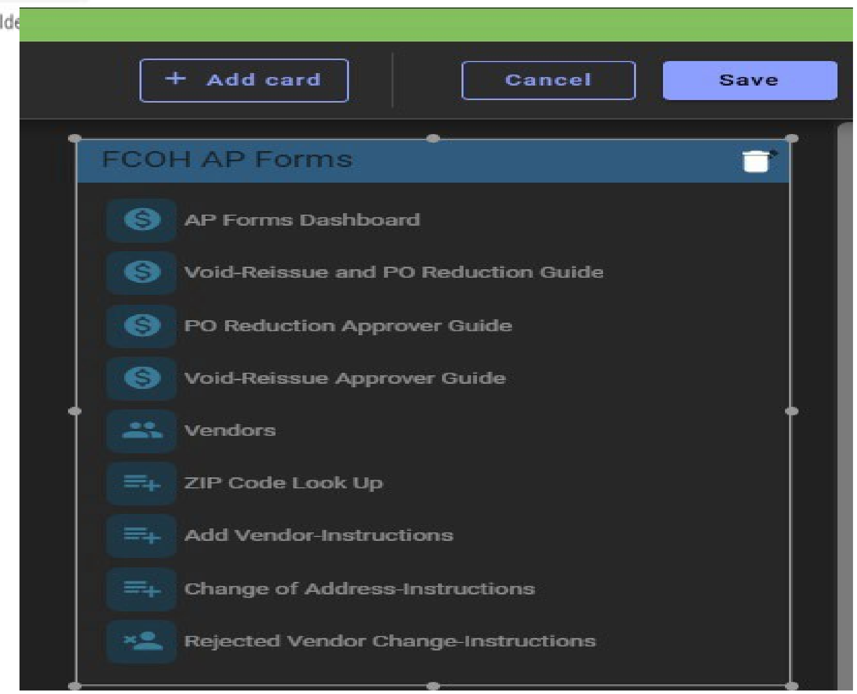
Leave location as is on page or adjust

Select Save





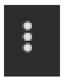




Edit Card

Select Pencil in top right

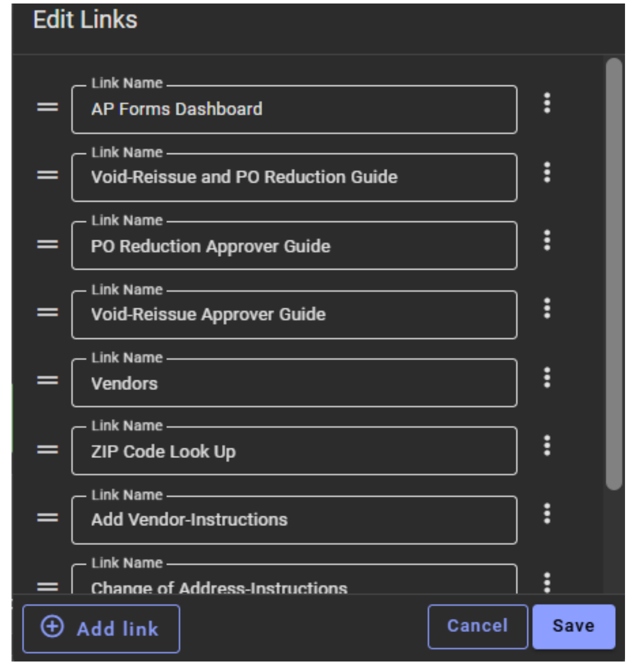
= → Click to move location of link

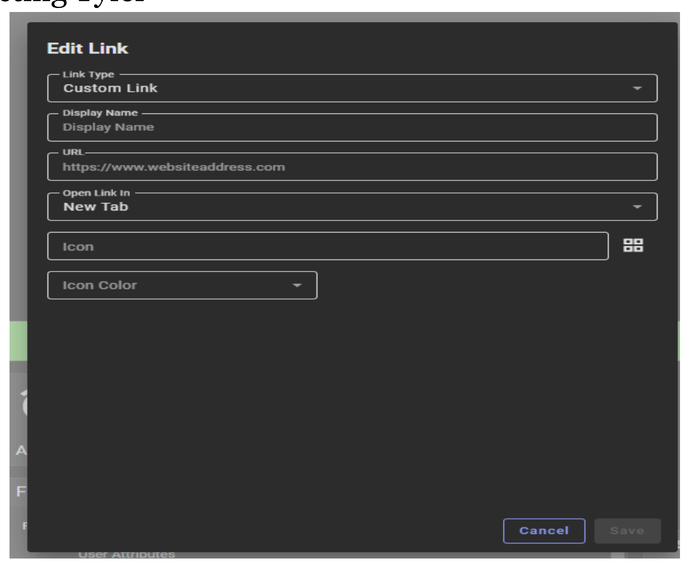


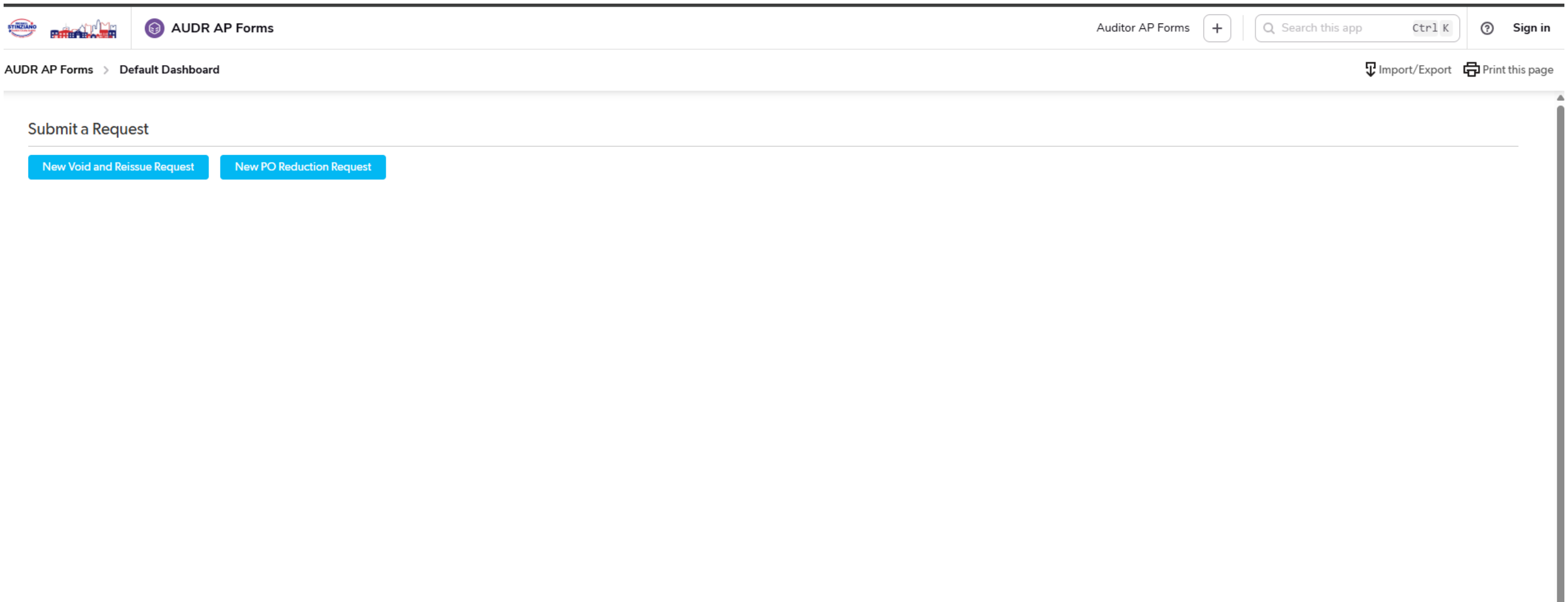
→ Edit Link or Delete Link

→ Add additional links

- Edit Link Box opens
- Select Link Type- Custom or Tyler Menu
- Enter Display Name
- Enter URL (would be a paste of the custom link or selecting Tyler menu link)
- Open Link In → Keep as New Tab
- Select Icon
- Select Icon Color
- Select Save



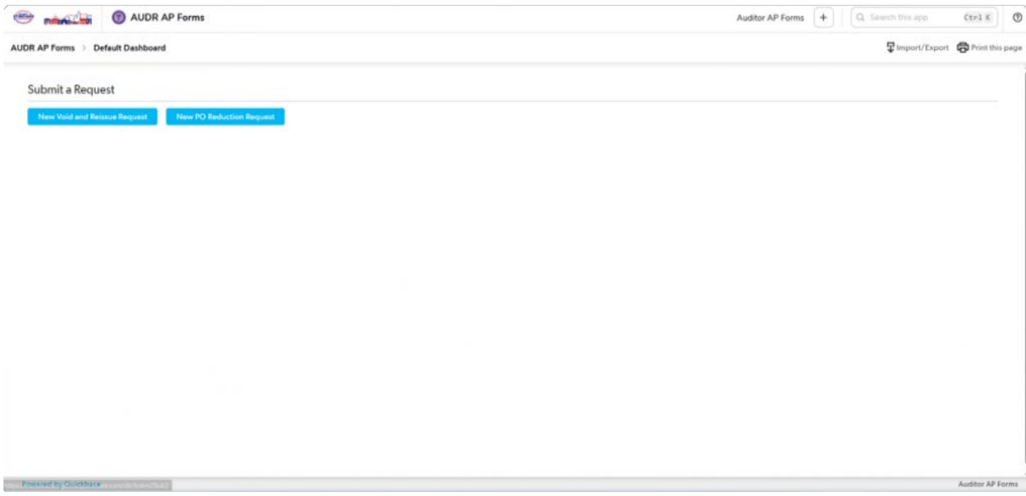




AP Forms Mini App Feedback Survey

Void, Reissue, and PO Reductions Request User Guide

Navigate to the URL below to access the respective forms. From the home page you can select which request you would like to submit.
https://franklincountyohio.quickbase.com/nav/app/bvbm28ub3/action/appoverview



Void and Reissue Request

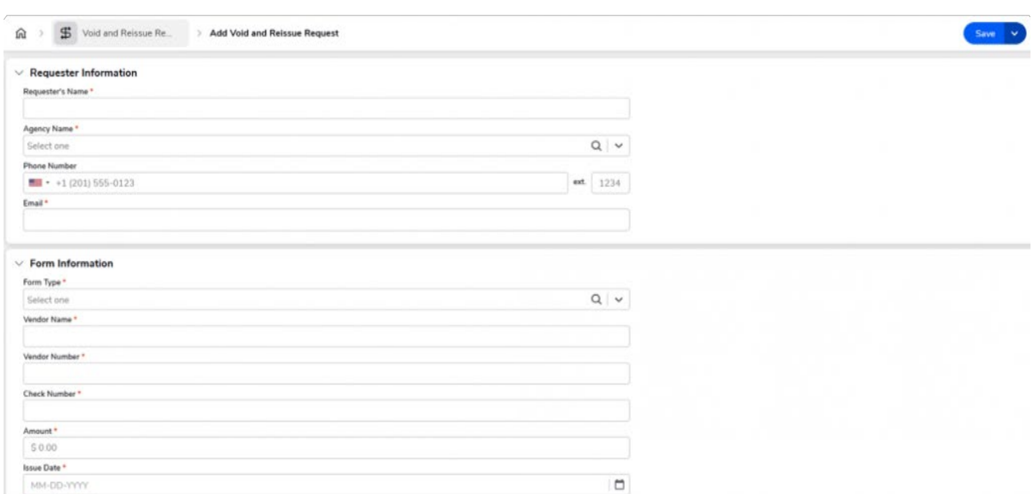
Please note:

-All fields are required except for phone number and a second authorizer selection.

-The Authorizers drop downs will not populate until an agency has been selected.

-We add a validation code field to make sure the form is being filled out by a real person and not an automated bot sending spam. **The validation code is 47.**

-The save button can be found in the top right corner of the form.



PO Reduction Form Request

Please note:

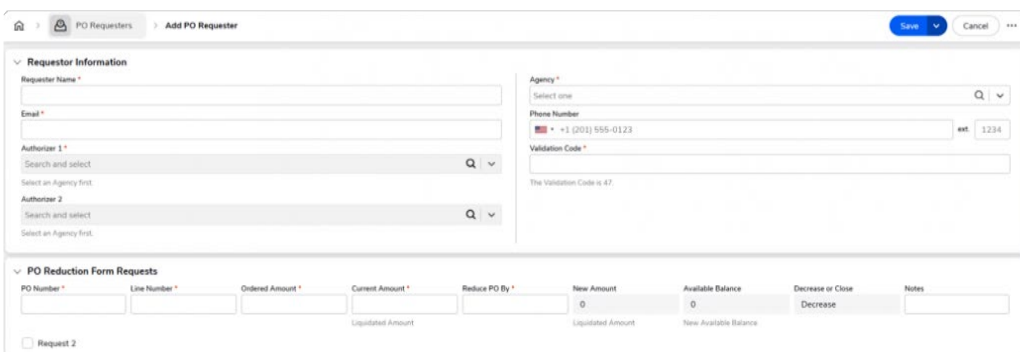
-You are limited to 10 PO Reduction requests on one form, if you need to submit more, you are required to submit an additional form.

-To add an additional requests, please select the checkbox to display an additional line.
-All fields are required except for phone number and a second authorizer selection.

-The Authorizers drop downs will not populate until an agency has been selected.

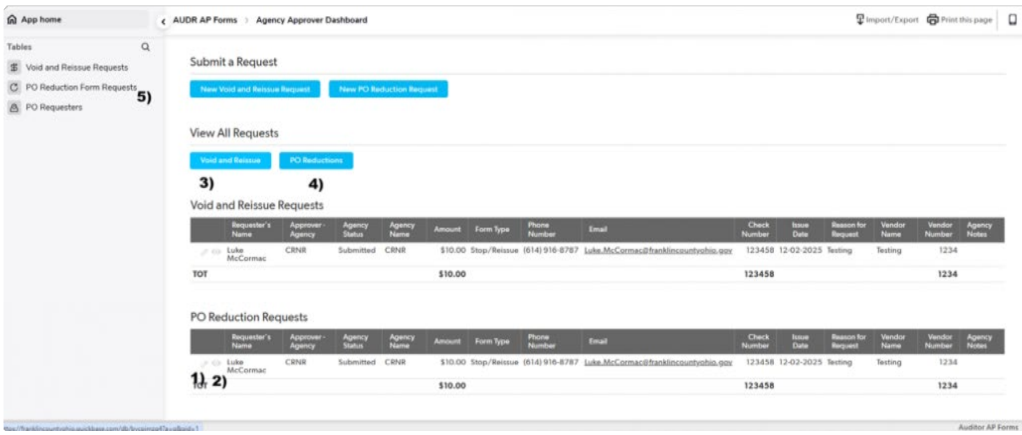
-We add a validation code field to make sure the form is being filled out by a real person and not an automated bot sending spam. **The validation code is 47.**

-The save button can be found in the top right corner of the form.



PO Reduction Approver Guide

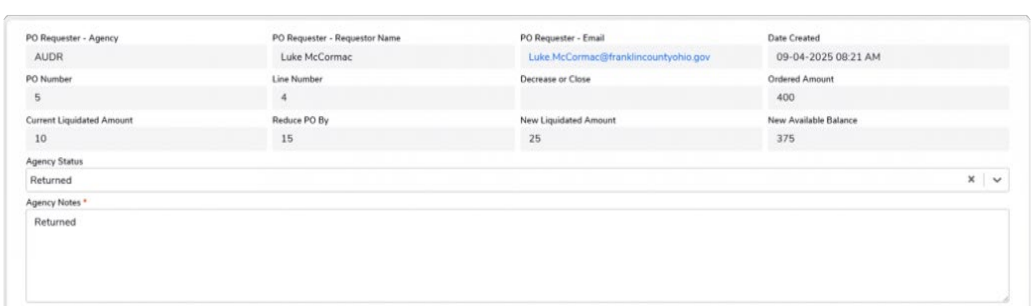
This User guide will demonstrate how as an Agency manager you can view, return, and approve PO Reduction requests. You can access the application using your windows credentials (the same credentials you log on to your computer with) at this URL. https://franklincountyohio.quickbase.com/nav/app/bvbm28ub3/action/appoverview



This is the initial landing page where you are presented with 5 options.

- This pencil icon is what you would select to edit a request, in this case you can update the status to approved or returned and add any relevant notes.
- The eye icon allows you to view a request.
- The default tables on the home page only display requests that need worked, that would be requests in a 'submitted' status. However if you would like to access all requests, including those which have been returned or approved you can use this button to view all of the Void and Reissue requests.
- This button has the same function as #3, however it is for PO Reduction Form Requests.
- You can also use these table links to view the complete listing of all requests in any of the three statuses.

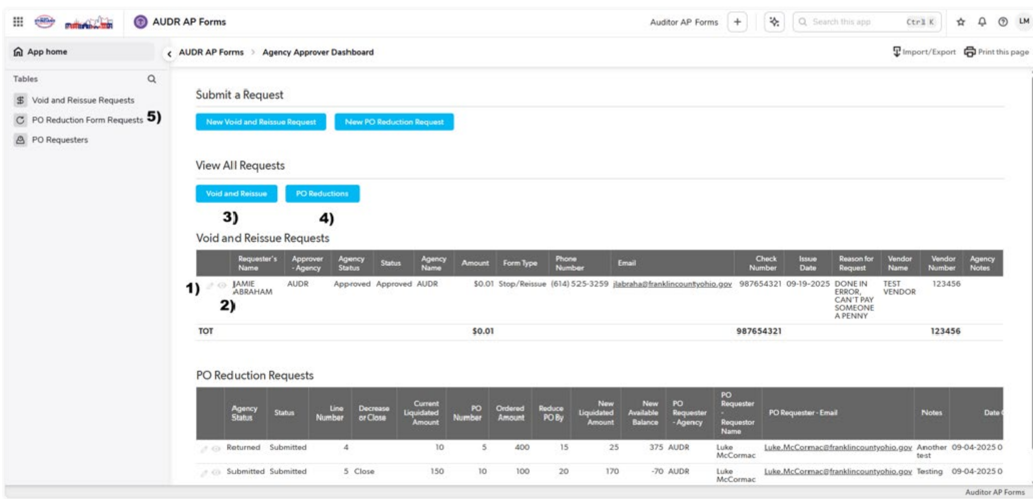
If you select the pencil for a PO Reduction request you will be redirected to the screen below.



From here you can review the request and select if it should be approved or returned by using the drop down field. **Note: if you select the status to be returned, you must provide notes in the 'Agency Notes' field explaining why. These will be included in an email that is automatically sent to the user who submitted the request letting them know why it was returned.**

Void and Reissue Approver Guide

This User guide will demonstrate how as an Agency manager you can view, return, and approve Void and Reissue requests. You can access the application using your windows credentials (the same credentials you log on to your computer with) at this URL.
https://franklincountyohio.quickbase.com/nav/app/bvbm28ub3/action/appoverview



This is the initial landing page where you are presented with 5 options. This guide focuses on Void and Reissue so we will look at this table first.

1) This pencil icon is what you would select to edit a request, in this case you can update the status to approved or returned and add any relevant notes.

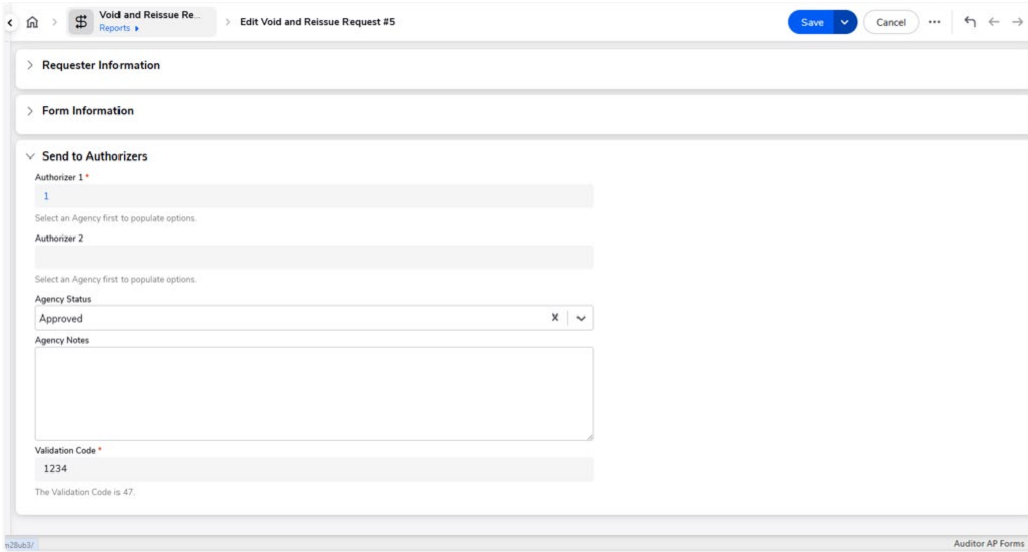
The eye icon allows you to view a request.

The default tables on the home page only display requests that need worked, that would be requests in a 'submitted' status. However if you would like to access all requests, including those which have been returned or approved you can use this button to view all of the Void and Reissue requests.

This button has the same function as #3, however it is for PO Reduction Form Requests.

You can also use these table links to view the complete listing of all requests in any of the three statuses.

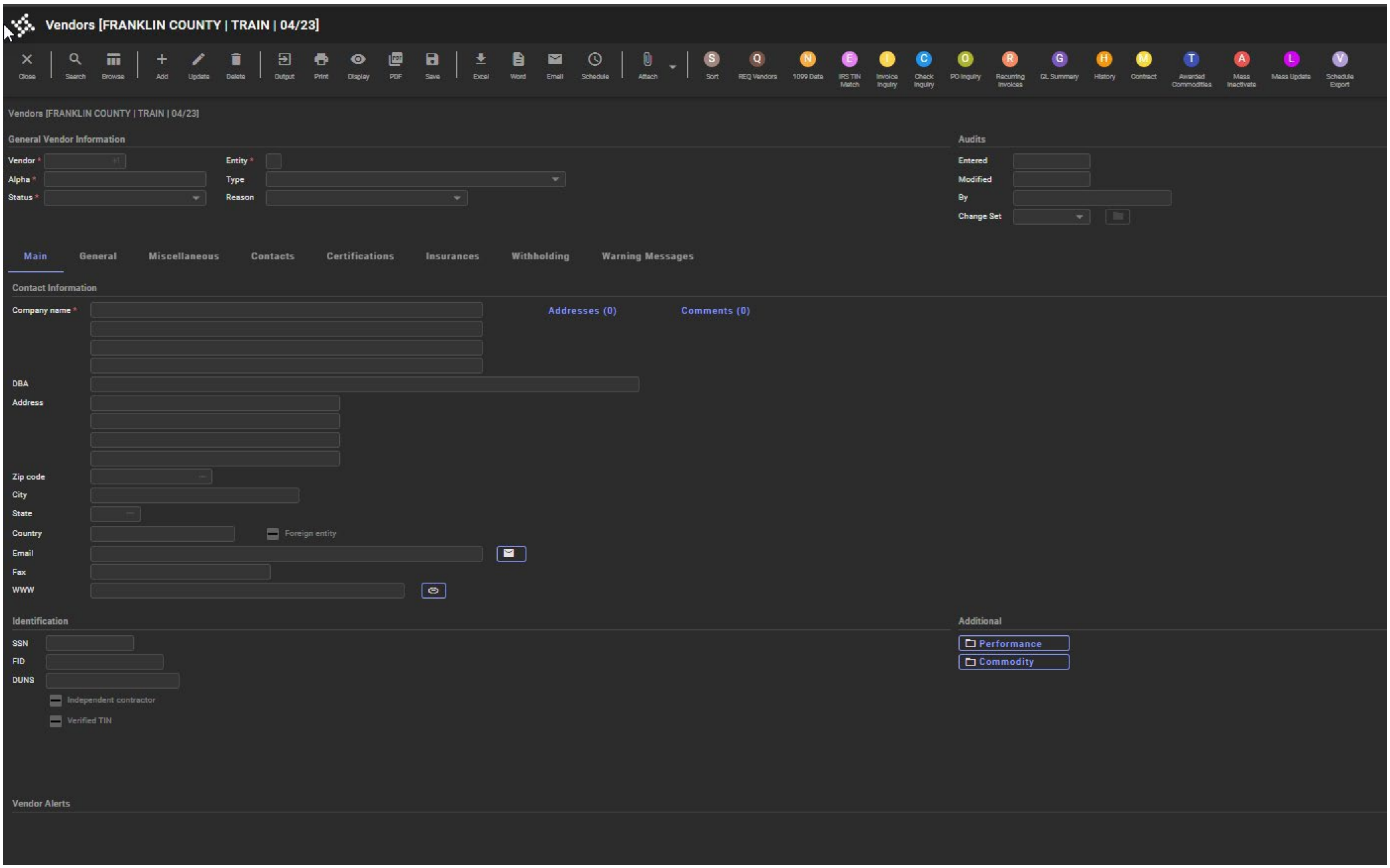
If you Select the 'pencil' icon for a void/reissue request you will be directed to this screen below.



From here you can review the request and select if it should be approved or returned by using the drop down field. **Note: if you select the status to be returned, you must provide notes in the 'Agency Notes' field explaining why. These will be included in an email that is automatically sent to the user who submitted the request letting them know why it was returned.**

If you select the pencil for a PO Reduction request you will be redirected to the screen below.

TRAIN: https://franklincountyoh-train.tylerhub.com



Look Up a ZIP Code™

FAQs)

By Address

Enter a corporate or residential street address, city, and state to see a specific ZIP Code'".

Find by Address

By City and State

Enter city and state to see all the ZIP Codes™ for that city.

Find by City & State

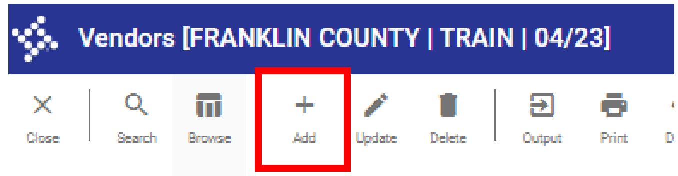
Cities by ZIP Code™

Enter a ZIP Code'" to see the cities it covers.

Find Cities by ZIP

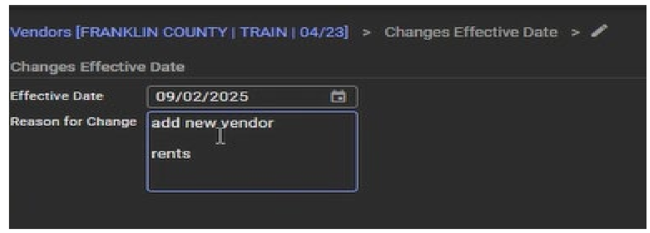
Adding a Vendor

Navigate to Financials > Accounts Payable >Vendor Processing > Vendors

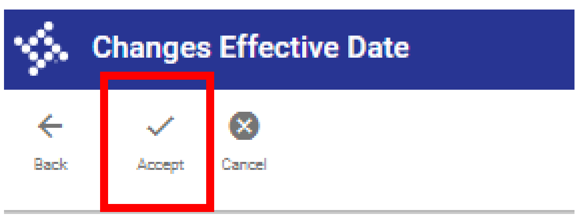


Or Select Vendors from the FCOH AP Forms Card

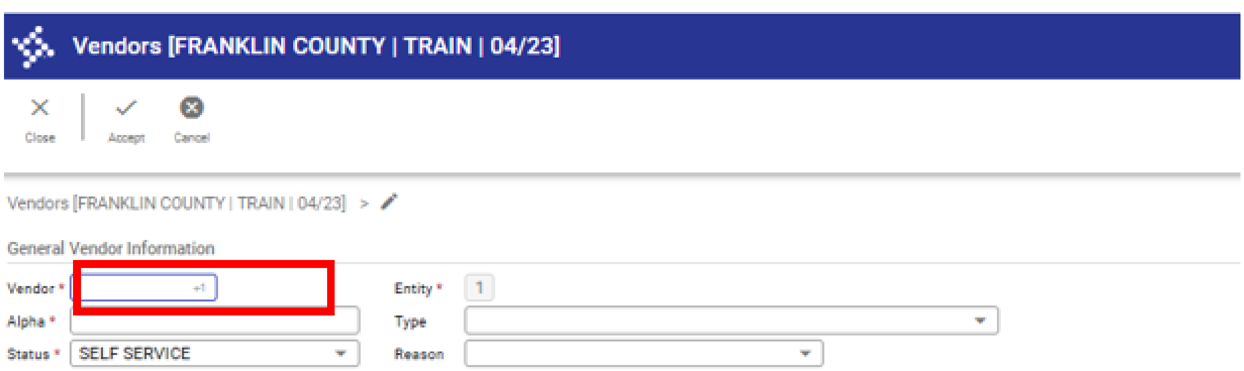
- At the top of the page select “Add”
    - This will open the Changes Effective Date page
        - Leave Effective date as is.



    - Type “ADD NEW VENDOR” (PLEASE USE ALL CAPS) and the “Description of Services Provided” for Reason for Change
        - Examples (Rent, Auto Repair, Kinship, Comp & Damages, etc…)
            - This will be used to determine 1099 information by the Auditor AP team.

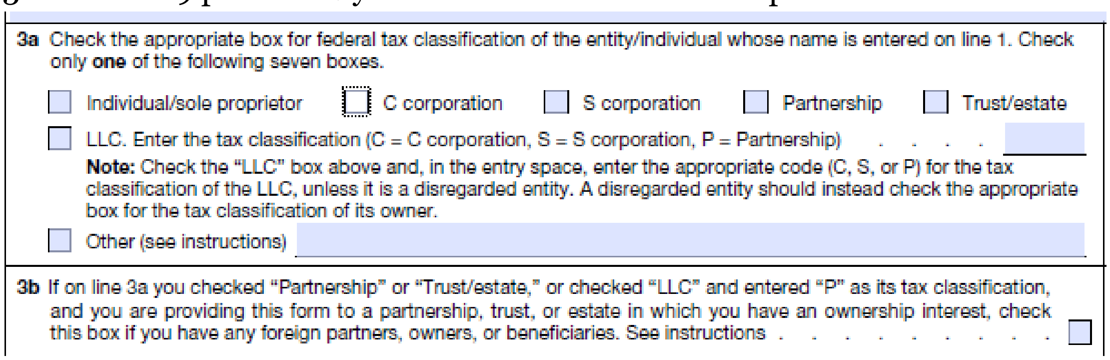


    - Select Accept-This will take you back to the Vendors page.
        - TAB key will also work as Accept (not ENTER)



- Click the “+1” in the Vendor field to select the next available number.

- Fill in the Alpha field with the name of the Vendor
  - Note: Maximum of 20 characters in the field.
  - Note: If the vendor is an **individual** then key (last name, first name)
    - Example **LAST, FIRST** (make sure to use a comma then a space before adding the first name)
- Change the Status Field to "Active".
- Use the drop down under the Reason field to select the best match based on box 3a of the W-9 provided by the vendor and the services provided.



3a Check the appropriate box for federal tax classification of the entity/individual whose name is entered on line 1. Check only **one** of the following seven boxes.

☐ Individual/sole proprietor ☐ C corporation ☐ S corporation ☐ Partnership ☐ Trust/estate

☐ LLC. Enter the tax classification (C = C corporation, S = S corporation, P = Partnership) . . . . .

Note: Check the "LLC" box above and, in the entry space, enter the appropriate code (C, S, or P) for the tax classification of the LLC, unless it is a disregarded entity. A disregarded entity should instead check the appropriate box for the tax classification of its owner.

☐ Other (see instructions)

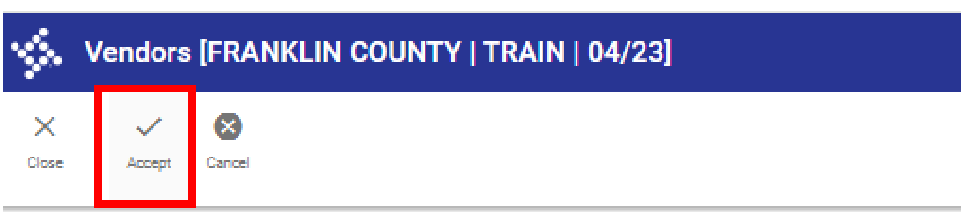
3b If on line 3a you checked "Partnership" or "Trust/estate," or checked "LLC" and entered "P" as its tax classification, and you are providing this form to a partnership, trust, or estate in which you have an ownership interest, check this box if you have any foreign partners, owners, or beneficiaries. See instructions . . . . ☐

    - **100 - COMPENSATION & DAMAGES**: Used if payments will be for Compensation.
    - **101 – SETTLEMENT PAYMENT**: Used if payments will be for Settlements
    - **CHUR – CHURCH** : Used for Churches
    - **CORP – CORPORATION** : Used if S Corp or C Corp is checked
    - **FSTR – FOSTER PARENT**: Vendor will be paid for being a Foster Parent
    - **GOVT – GOVERNMENT AGENCY**
    - **IND – INDIVIDUAL**: Used when Individual/Sole proprietor is checked and an SSN is provided
    - **K – KINSHIP**: Vendor will be paid for being Kinship
    - **NFP – NON-PROFIT ORGANIZATION**: Used for Non Profit organizations
    - **PART – PARTNERSHIP**: Used when Partnership is checked
    - **SOLE – SOLE PROPRIETOR** : Used when Individual/Sole proprietor is checked and an EIN is provided
    - **TR/E – TRUST/ESTATE**: Used if Trust/Estate is checked
    - **V – VOLUNTEER/INTERN**: Used for Interns

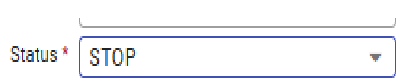
- Using the new W-9 fill in the following fields in ERP
    - Company name
        - **Note**: will auto generate from what was entered in the Alpha field but will need to be updated if the name is greater than 20 characters or was an individual.
        - **Individual should be First name Last name in the Company name field**
            - Ex. FIRST LAST
        - DBA (If applicable)
        - Address
            - **Type in the 2nd address line**
                - Only use the 1st address line for "ATTN" (If applicable)
        - Zip Code (include +4)
        - City
        - State

What if the address for the vendor needs to be different from the W-9?

- A sticky note can be added to the W-9 when it is uploaded in TCM (Content Manager) listing the address keyed.
    - See instructions for attaching W-9

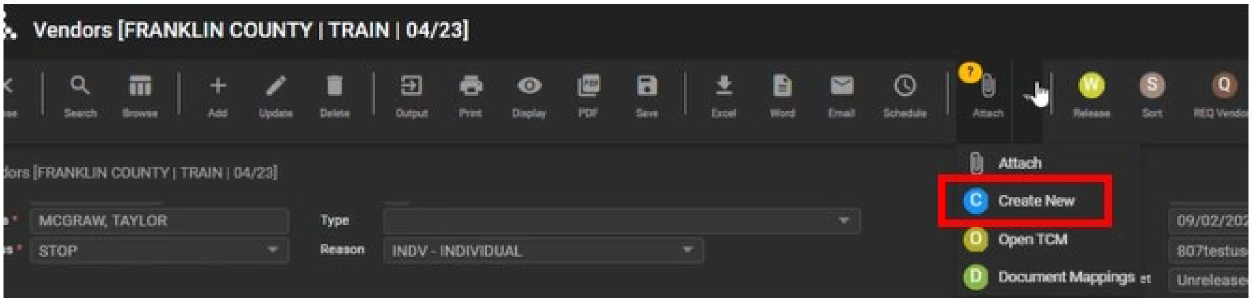


- Select Accept

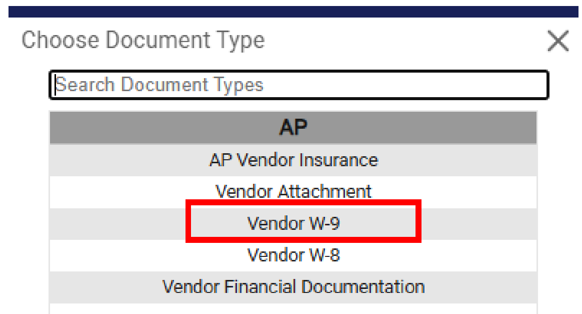
NOTE: The status will now say "STOP". 

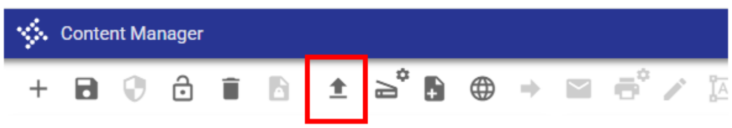
Once the workflow is approved by AP the status will change back to active.

Attaching the W-9

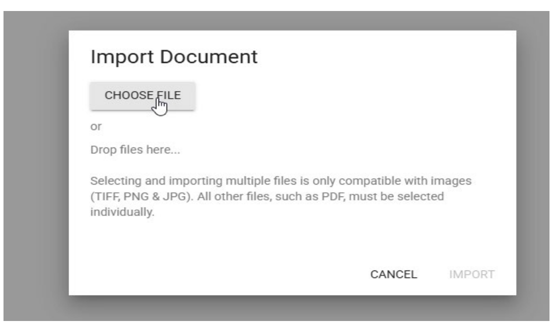


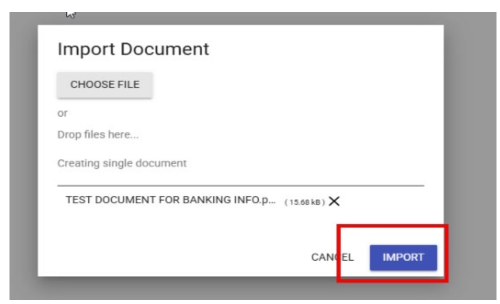
- Click on the drop down beside the attachment and select "Create New"
  - This will open Content Manager
  - Select "Vendor W-9"





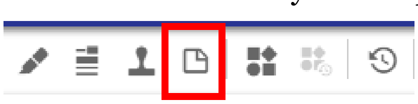
- Upload the W-9 PDF by using the Import attachment.
  - Either choose file or drag and drop file to import.





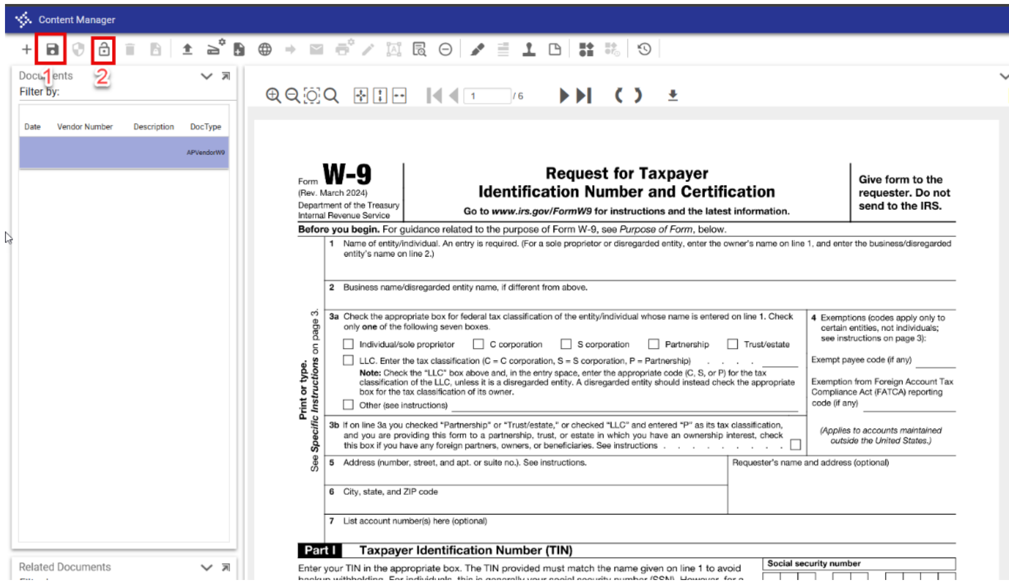
- When file has been loaded, select import

- If the address for the vendor needs to be different from what is on the W-9 the "Add a sticky note" option can be used.

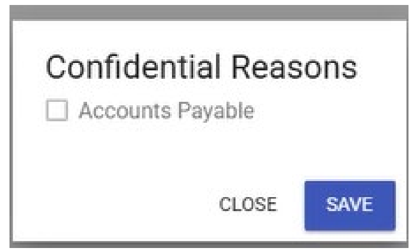


  - After selecting this option click and drag on the uploaded W-9 to create the sticky note.
  - Then edit the text field to show the correct address.

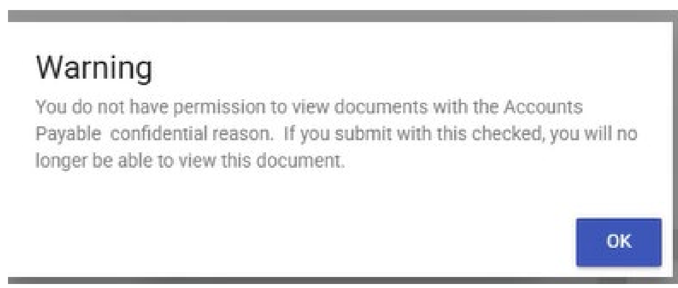
- 1-Select disk icon to Save
- 2-Select lock to mark confidential
  - This step must be completed to safeguard associated sensitive information.



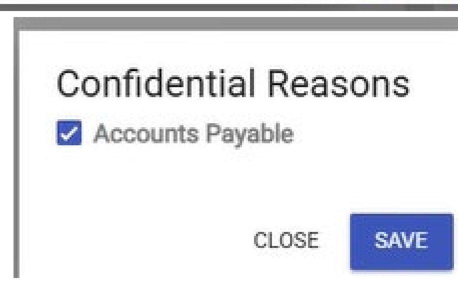
  - Select Accounts payable for confidential reasons



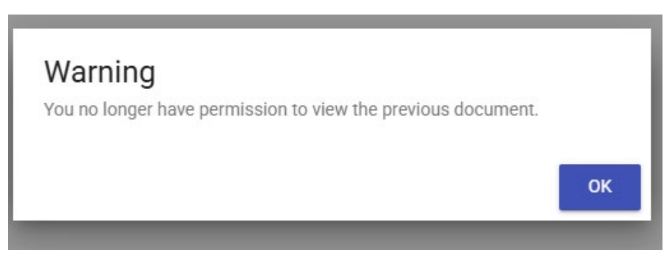
- Select Ok on the following Pop up

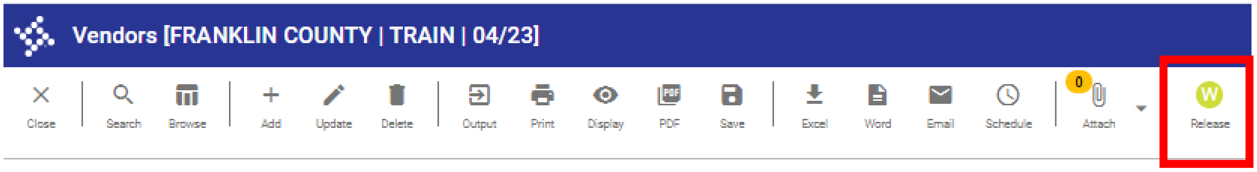


- Then select Save

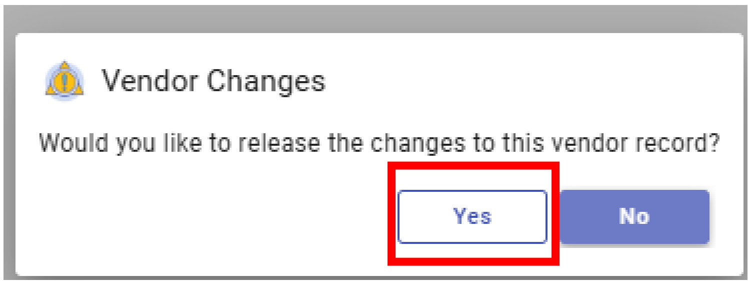


- The following pop up will appear
  - Select OK
  - Close out of Content Manager window.
  - This will take you back to the Vendor page



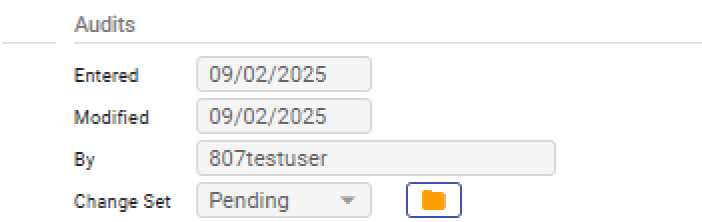


- Select “Release” at the top of the page.



- Select Yes on the pop up.
- This will start the Workflow process

Once Released the “Change Set” field under the Audits section of the vendor should now say “Pending”.



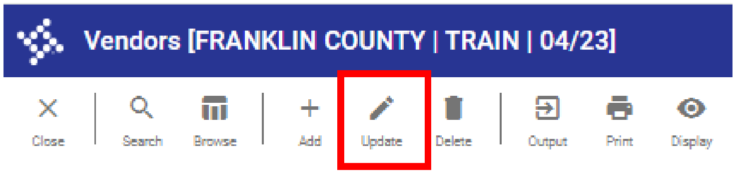
Note: The Option to release at the top of the page is only available if there are pending items.

- Once submitted and Approved or Rejected by AP you will either receive an email notifying you that the new vendor is ready to be used or a rejection email.
  - The Approval email will come from a member of the AP Team
  - The rejection email should give you a reason why the submission was rejected and will come from ERP.
  - Follow Rejected Vendor Change instructions.

Change of Address

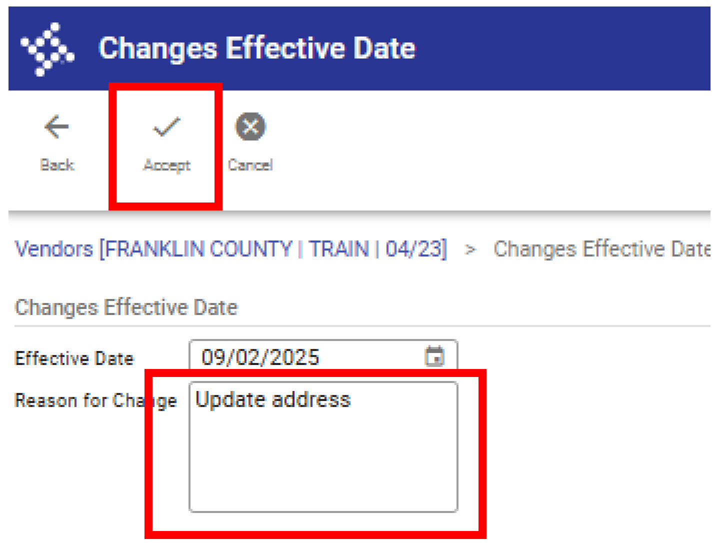
Vendors Hub

- Search for the vendor that needs the change of address.

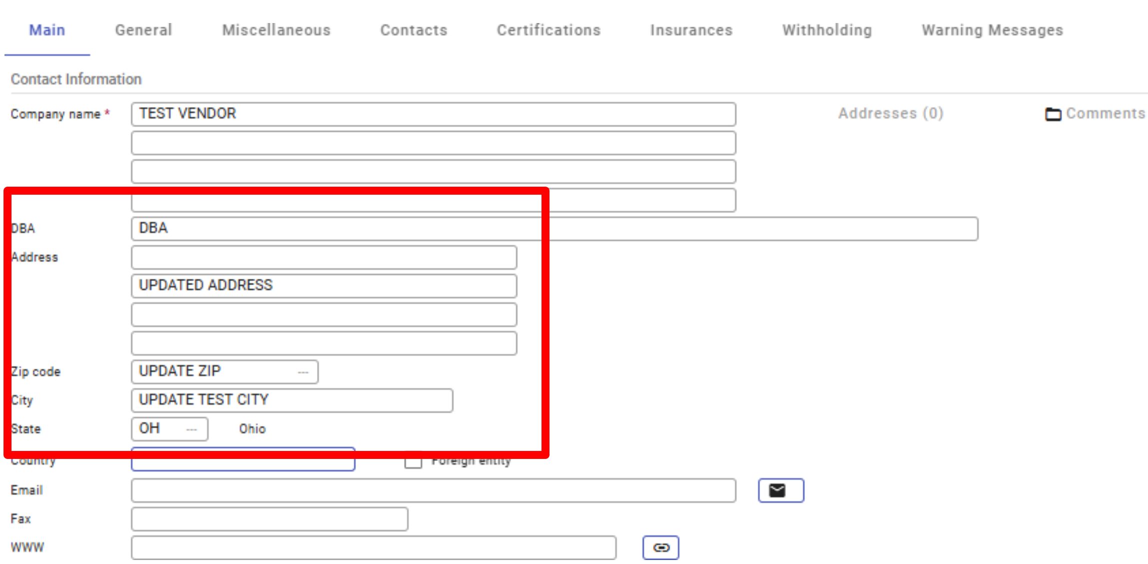


- Select "Update" at the top of the page

- The Changes Effective Date page will open.
    - Fill out the "Reason for Change" field
        - Examples
            - Update address
            - Add remit #1
            - Update remit #1
- Accept at the top of the page.
    - TAB (not ENTER) will accept.

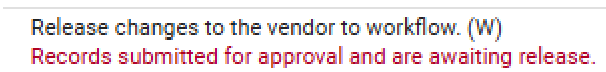


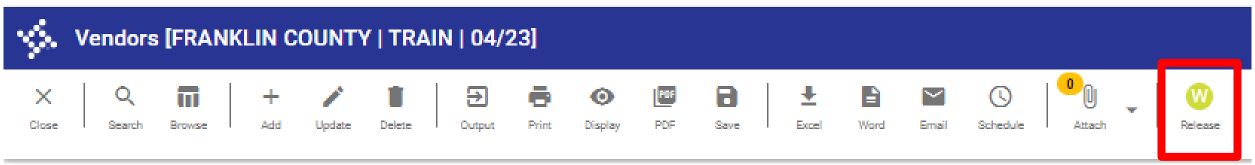
- The vendor page will appear again with the ability to edit fields.



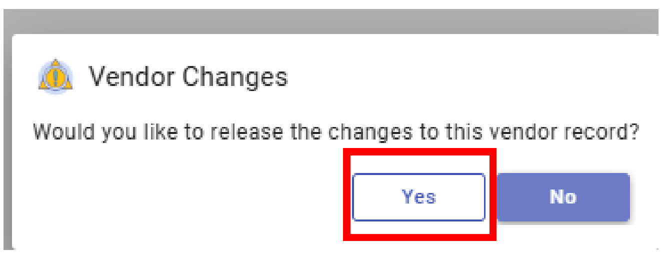
- Update all fields that need changed for the updated address/ new remit address.
  - DBA (if applicable)
  - Address
  - Zip (+4)
  - City
  - State
- Accept once all necessary fields have been updated

- The following message will appear at the bottom of the page



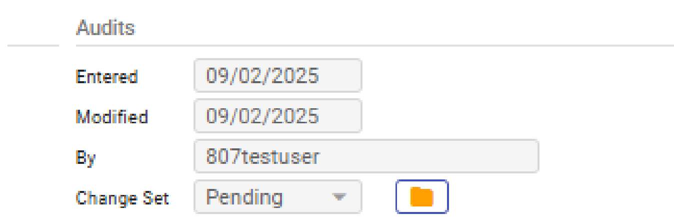


- "Release" at the top of the page



  - Select Yes on the pop up.
  - This will start the Workflow process

- Once Released the "Change Set" field under the Audits section of the vendor should now say "Pending".



Note: The Option to release at the top of the page is only available if there are pending items.

Note: Additional remit addresses will be added at the discretion of the Auditor's office.

Rejected Vendor Change

If you've added a new vendor to the workflow and it gets rejected, you'll receive an email like the image below. The rejection email will specify the reasons for the vendor's rejection.

To correct the issue:

- From Vendors
- Search by Vendor #
- Select →Update
- Enter Reason for Change: New Vendor Correction
- Select Accept
- Make the necessary corrections, including updating the status from STOP to Active
- Select Accept
  - Records submitted for approval and are awaiting release.
- Select Release
  - Releases changes to the vendor to workflow.

Pending Vendor Change Rejected

M munisadmin@franklincountyohio.gov
To Abraham, Jamie L.

Vendor 416015 Change (1) that was to be effective on Sep 23 2025 12:00AM has been rejected by 807ajtowns. 807ajtowns's comment was:
ZIP CODE INCORRECT.
To view additional information about this Munis item use this link:
Additional Information

This is a Munis system generated message. Please do not reply to this unmonitored mailbox.