

Onboarding a Vendor to work at DMS

If you have a project and need a vendor who isn't on the list, you'll need to take some steps to onboard that vendor. This ensures that the vendor is appropriately licensed, has the proper liability insurance, and has the proper paperwork to recognize our tax exempt status. If you do *not* have a vendor selected, please let a member of the vendor management group know, and they will help you find a vendor so that your project can be completed without unnecessary delay.

There are three types of Vendors at DMS, based on risk:

- Low Risk Vendors
 - Office Supply, One-Time Catering, and Vending Vendors
- Medium Risk Vendors
 - Janitorial and Maintenance Vendors
- High Risk Vendors
 - IT contractors, security, high-dollar builds

For Low risk vendors:

1. Collect basic contact information (via the Vendor Intake Form)
2. Have the vendor fill out a W-9 Form
3. Obtain a copy of their Business Licence or validate proof of their EIN (Double check with Finance on this)

For Low risk vendors, we will verify that they are still active and that we still have the correct contact information approximately every 2-3 years. If there's an issue with reliability or there are issues with the service, the committee that works with the vendor will be responsible for conflict resolution or to make the decision to stop using that vendor.

For Medium Risk vendors:

1. Collect basic contact information (via the Vendor Intake Form)
2. Have the vendor provide a W-9 Form
3. Obtain a copy of their Business License and get a copy of their proof of insurance.

For Medium Risk vendors, we will reverify their insurance and business license every year. If there's an issue with reliability or there are issues with service, the Logistics/Facilities team will mediate the conflict.

You can Contact any Member who has Member Maker Admin access, the CTO or the COO to make a "One-Off" badge for the vendor. When making the request, please identify which locks the vendor will need access to. Monthly, the COO and a member of the IT team will go through and validate any One-Off badges to ensure that they still need to be kept active.



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