



Commonwealth Vendor Group Job Aid

Online Submission of Vendor Maintenance Request Form (AP-SW-502)

Overview

Vendor additions and updates are made in Cardinal by submitting a properly completed Vendor Maintenance Request form (Cardinal AP-SW-502) to the Commonwealth Vendor Group. Select individuals at each agency may request/approve vendors to be added or updated in the Cardinal Vendor Table through the Department of Accounts Secure Forms Website. The system will require two roles for each agency, a requestor and an approver. The requestor will enter the vendor maintenance information into the form in the system, and route it to an agency approver who will submit to CVG electronically. The Secure Forms Site provides agencies with a secure method of transmitting and reviewing vendor maintenance requests with CVG.

For instructions regarding completing the vendor request form, please see **Instructions for Completing the Vendor Maintenance Request Form**, located in the Statewide Toolbox on the Cardinal Project Site and on the DOA website on the Commonwealth Vendor Group link.

The Commonwealth Vendor Group will provide login credentials to all current preparers and approvers as a system rollout. For future requests, CVG will provide each agency with additional login credentials when a completed Agency Signature Authorization for Vendor Maintenance form has been submitted by the agency.



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Form Preparation:

Navigate to the Virginia Department of Accounts Secure Forms Website
(https://forms.doa.virginia.gov/Main_Menu.cfm).

Financial Accountability Reporting Excellence.

DOA Virginia Department of Accounts

DOA Secure Forms

DOA Forms > Main Menu > Login

Contact Us | Search DOA | Entire Site | CAPP Only | CAPP - Cardinal Only GO

Main Menu

Forgot Password

Log On

Welcome to DOA Secure Forms!!!

Please enter your User ID and Password:

User ID:

Password (case-sensitive)

Log On

If you have forgotten your password click the forgot password/new account button

Successfully Logged Off

The security of your personal information is important to us!

Diligent efforts are made to ensure the security of Commonwealth of Virginia systems. Before you use this Web site to conduct business with the Commonwealth, please ensure your personal computer is not infected with malicious code that collects your personal information. This code is referred to as a [keylogger](#). The way to protect against this is to maintain current [Anti-Virus](#) and [security patches](#).

For more information on protecting your personal information online, refer to the [Citizens Guide to Online Protection](#) [Online Protection Glossary](#)

- 1 Enter your **User ID** (provided by CVG).
- 2 Enter your **Password**.
- 3 Select the **Log On** button.



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Virginia.gov Agencies | Governor

DOA Virginia Department of Accounts

DOA Secure Forms

DOA Forms > Main Menu

My Forms
Personal Options
Log Off
CVG@DOA.VIRGINIA.GOV

Main Menu

Forms

[My Forms](#)

Commonwealth of Virginia Substitute W-9 [PDF](#)

Cardinal Vendor Maintenance Request [Start new form](#)

- 4 The **Main Menu** page displays. Select the **Start new form** button.

Cardinal Vendor Maintenance Request - Add New Form

Submit Form Cancel New Form

Vendor Maintenance Request

* Denotes a required field

* Requested By: TEST USER
* Business Unit: 15100
* Email: Ashlyn.Jinnette@doa.virginia.gov
Email 2:

* Approval Signature: _____
* Phone: _____
* Approval Date: _____
additional email address to receive notifications about this form

Action Requested

Add New Vendor Update Existing Vendor Reactivate Existing Vendor Expedite

Identifying Information

Vendor ID: *Required when updating an existing vendor. Corporate Vendor: Yes No

* Vendor Name 1:

Vendor Name 2:

Vendor Short Name: Corporate Vendor ID:
or Parent Company if applicable

Vendor Status - INACTIVE: *Required when updating an existing vendor to inactive.

* Persistence One Time Regular * W-9 Required Yes No

* ID Type: * ID Number: * W-9 Attached Yes No



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- 5 The **Vendor Maintenance Request Form** page displays. The following fields automatically populate based on your login information:
 - a. **Requested By**
 - b. **Business Unit**
 - c. **Email**
- 6 Complete the form based upon desired action: Add New Vendor, Update Existing Vendor, or Reactivate Existing Vendor (See Instructions for the Vendor Maintenance Request Form).

Note: All required fields are denoted with an asterisk (*). Reactivating an existing vendor does not require address information to be completed.
- 7 Once all pertinent information has been entered, select the **Submit Form** button.
- 8 The form updates its status to **“Ready to submit for approval.”**

The screenshot shows the 'Cardinal Vendor Maintenance Request' form. At the top, there are buttons for 'Edit Form', 'Submit for Approval', 'Attachments', and 'View PDF'. A red box highlights the 'Attachments' button and a status message below it that reads 'Status: Ready to submit for approval'. Below this, there is a 'New Form Added' notification. The main form area has the 'CARDINAL' logo and the title 'Vendor Maintenance Request'. It includes a legend for required fields and several input fields: 'Requested By' (TEST USER), 'Business Unit' (15100), 'Email' (Ashlyn.Jinnette@doa.virginia.gov), 'Approval Signature', 'Phone', and 'Approval Date'. There is also a section for 'Action Requested' with radio buttons for 'Add New Vendor', 'Update Existing Vendor', and 'Reactivate Existing Vendor', and a checkbox for 'Expedite'. The 'Identifying Information' section contains fields for 'Vendor ID', 'Vendor Name 1' (Commonwealth Vendor Group), 'Vendor Name 2', 'Vendor Short Name', and 'Corporate Vendor ID'. A 'Vendor Status - INACTIVE' checkbox is also present.

- 9 You can now review all the information on the page.
- 10 If an attachment is required, navigate to the attachments page and upload any relevant documentation. Such as a properly completed Commonwealth of Virginia Substitute W-9. Select **Return to Form** when complete.
- 11 Once the form is complete, select **Submit for Approval**.



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The screenshot shows the 'DOA Secure Forms' interface. The header includes 'Virginia.gov Agencies | Governor' and 'Financial Account'. The main title is 'DOA Secure Forms'. Below the header, there is a navigation bar with 'DOA Forms > Main Menu > Cardinal Vendor Maintenance Request' and 'Contact Us | Search'. The left sidebar contains 'My Forms', 'Main Menu', 'Log Off', and the user ID 'AGY510'. The main content area is titled 'Cardinal Vendor Maintenance Request - Submit for Approval'. It features an 'Accept' button (highlighted with a red box) and a 'Cancel' button. A red message states: 'Server is DOA-CF2. Emails will be sent to cvg@doa.virginia.gov. This message will not appear in production.' Below this, the form title is 'Vendor Maint Req - James Monroe'. A red note reads: 'The following users are authorized to approve this form. Please check all users who should receive an email request for approval. ** At least one user must be selected.' Two checkboxes are listed: 'VDOT APPROVER' and 'VDOT APPROVER 2', both of which are checked and highlighted with a red box.

- 12** Each agency has the opportunity to submit vendor requests to any number of authorized approvers. Select the approver(s) that the vendor form should be submitted to, by clicking in the box.

Note: Each request must be submitted to a single user email address. CVG is unable to create group emails as user ids per security standards.

- 13** Select **Accept** to submit the vendor request form to an authorized agency approver.



Online Submission of Vendor Maintenance Request Form (AP-SW-502)

Agency Approval Process:

DOA Vendor Maintenance Request Form - Approval Needed
cvg@doa.virginia.gov
Sent: Mon 7/13/2015 11:54 AM
To: CVG (DOA)

A new Cardinal Vendor Maintenance Request Form has been submitted by VDOT USER and is awaiting agency approval.

Agency: 510
Form Vendor Maint Req - James Monroe
Description:
Form ID: 3019

DOA Secure Forms: https://forms.doa.virginia.gov/Main_Menu.cfm

This email was sent to the following email address(es):
carlton.mckinnon@doa.virginia.gov

If you have received this email in error, please disregard.

- 1 Once a VMRF is submitted for approval, the agency's designated approver(s) receive an email stating that a request form is awaiting approval.
- 2 Make a note of the **Form ID** listed in the message.
- 3 Navigate to the Virginia Department of Accounts Secure Forms website to approve the request (https://forms.doa.virginia.gov/Main_Menu.cfm).



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Financial Accountability Reporting Excellence.

DOA Virginia Department of Accounts

DOA Secure Forms

DOA Forms > Main Menu > Login

Contact Us | Search DOA | Entire Site | CAPP Only | CAPP - Cardinal Only GO

Main Menu

Forgot Password

Log On

Welcome to DOA Secure Forms!!!

Please enter your User ID and Password:

User ID:

Password (case-sensitive):

If you have forgotten your password click the forgot password/new account button

Successfully Logged Off

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For more information on protecting your personal information online, refer to the [Citizens Guide to Online Protection](#), [Online Protection Glossary](#)

- 4 Login using your credentials (**User Name** and **Password**).
- 5 Select the **Log On** button.

Virginia.gov Agencies | Governor

DOA Virginia Department of Accounts

DOA Secure Forms

DOA Forms > Main Menu

My Forms

Personal Options

Log Off

CVG@DOA.VIRGINIA.GOV

Main Menu

Foms

Commonwealth of Virginia Substitute W-9 [PDF](#)

Cardinal Vendor Maintenance Request

- 6 Select **My Forms**.



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Online Submission of Vendor Maintenance Request Form (AP-SW-502)

Department of Accounts Secure Forms

Last Update Range: to Agency: **Form ID:** Description: Requested By: Form: Status:

Records 1 - 20 of 49

	Last Update	Agency	Form ID	Description	Requested By	Status	Attachments
<input type="button" value="View/Edit"/>	10/26/2016	222	2201	Vendor Maint Req -		Form Submitted by Agency	--
<input type="button" value="View/Edit"/>	10/26/2016	222	2225	Vendor Maint Req -		Form Submitted by Agency	--
<input type="button" value="View/Edit"/>	10/26/2016	222	2996	Vendor Maint Req -		Form Submitted by Agency	--
<input type="button" value="View/Edit"/>	10/26/2016	222	13582	Vendor Maint Req -		Form Submitted by Agency	--
<input type="button" value="View/Edit"/>	12/06/2016	222	24436	Vendor Maint Req -		Form Submitted by Agency	--
<input type="button" value="View/Edit"/>	02/02/2017	222	25366	Vendor Maint Req -		Form Submitted by Agency	--
<input type="button" value="View/Edit"/>	02/02/2017	222	25382	Vendor Maint Req -		Form Submitted by Agency	--
<input type="button" value="View/Edit"/>	02/02/2017	222	25392	Vendor Maint Req -		Form Submitted by Agency	--

- 7 Search by entering the form ID in the **Form ID** field at the top of the page.
- 8 Select the **View/Edit** button on the once the form has been located.

Cardinal Vendor Maintenance Request

Status: Awaiting Agency Approval

Vendor Maintenance Request

Denotes a required field

Requested By: Test User * Approval Signature: _____
 Business Unit: 15100 * Phone: _____
 Email: cvg@doa.virginia.gov * Approval Date: _____
 Email 2: _____ *additional email address to receive notifications about this form*

Action Requested

Add New Vendor Update Existing Vendor Reactivate Existing Vendor Expedite

Identifying Information

Vendor ID: _____ **Required when updating an existing vendor.* Corporate Vendor: Yes No
 Vendor Name 1: Test Vendor
 Vendor Name 2: _____
 Vendor Short Name: _____ Corporate Vendor ID: _____
or Parent Company if applicable

- 9 Review the vendor form.




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- 10 Select the **Deny Form** button if the form contains missing information or if corrections are required. This will send the form back to the Preparer with comments via email. The Preparer can then update and resubmit the form.
- 11 Select the **Edit Form** button if the requestor is not able to make the necessary updates to the request. In this scenario, the current approver becomes the new requestor, and will not be able to approve the request.

[Approve Form](#) [Deny Form](#) [Attachments](#) [View PDF](#) [Status Change Log](#)

Status: Awaiting Agency Approval



Vendor Maintenance Request

** Denotes a required field*

* Requested By: <u>VDOT USER</u>	* Approval Signature: _____
* Business Unit: <u>51000</u>	* Phone: _____
* Email: <u>Ashlyn.Jinnette@doa.virginia.gov</u>	* Approval Date: _____
Email 2: _____	<i>additional email address to receive notifications about this form</i>

*** Action Requested**

Add New Vendor Update Existing Vendor Expedite

Identifying Information

Vendor ID: <u>104788</u>	<i>*Required when updating an existing vendor.</i>	Corporate Vendor: <input type="radio"/> Yes <input type="radio"/> No
* Vendor Name 1: <u>Andrew Bordwin</u>		
Vendor Name 2: _____		
Vendor Short Name: <u>ANDREW BOR-001</u>	Corporate Vendor ID: _____	

- 12 Select the **Approve Form** button if the form has been completed accurately.
- 13 The VMRF is then populated with an e-signature for the authorized approver. The form will then route to CVG.



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CVG Review:

- 1 Once the form is submitted, CVG will receive an email regarding the new request and process it accordingly.
- 2 After the request has been received and reviewed, the CVG will continuously update the status on the vendor form. This will give each agency real time updates on the current status of a particular request. See specific status options on page 11.
- 3 Once the vendor has been added in Cardinal and approved by the CVG staff, the agency's Preparer and Approver will receive an email update regarding the vendor request. See example below.

DOA Vendor Maintenance Request Form - Status Update
cvg@doa.virginia.gov
Sent: Mon 7/13/2015 12:47 PM
To: CVG (DOA)

The status of the following form has been updated to "Approved" by the Department of Accounts.

Vendor Maint Req - James Monroe
Vendor has been approved and is available for use. #0000012345

You do not need to take any action at this time.

DOA Secure Forms: https://forms.doa.virginia.gov/Main_Menu.cfm

This email was sent to the following email address(es):
Carlton.McKinnon@doa.virginia.gov.

If you have received this email in error, please disregard.



Online Submission of Vendor Maintenance Request Form (AP-SW-502)

Status Updates for the Vendor Form:

- 1 Throughout the vendor review process, the CVG will continuously provide updates on the status of the agency vendor maintenance request form. Seen below, is a sample email relating to a status update, and all of the updates statuses that are available.

DOA Vendor Maintenance Request Form - Status Update
 cvg@doa.virginia.gov
 Sent: Mon 7/13/2015 12:41 PM
 To: CVG (DOA)

The status of the following form has been updated to "Incomplete with errors" by the Department of Accounts.

Vendor Maint Req - James Monroe
 Vendor Form Not Signed John Doe CVG Analyst

Please review the form and make any requested changes.

DOA Secure Forms: https://forms.doa.virginia.gov/Main_Menu.cfm

This email was sent to the following email address(es):
carlton.mckinnon@doa.virginia.gov.

If you have received this email in error, please disregard.

Status Details:		
Description	Agency will have to resubmit	Status on "My Forms"
Incomplete with errors	Yes	Awaiting Agency Action
In review	No	Awaiting DOA Action
DOA Awaiting Further Information	Yes	Awaiting Agency Action
Awaiting Agency Approval	Yes	Awaiting Agency Action
Form Submitted by Agency	No	Awaiting DOA Action
Complete/Waiting Approval	No	Awaiting DOA Action
Ready to submit for approval	Yes	Awaiting Agency Action
Denied - Awaiting Further Information	Yes	Awaiting Agency Action
Approved	No	Complete



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- 2 Each agency will also have the opportunity to review a log of all status changes that have been made for a particular form. This can be done by selecting **Status Change Log**, while reviewing the vendor form. See examples below.

Cardinal Vendor Maintenance Request

Attachments View PDF Status Change Log

Status: Form Submitted by Agency

Form status updated

	Vendor Maintenance Request
<small>* Denotes a required field</small>	
* Requested By: <u>Test User</u>	* Approval Signature: <u>Austin Oakes</u>
* Business Unit: <u>15100</u>	* Phone: _____
* Email: <u>cvg@doa.virginia.gov</u>	* Approval Date: <u>2/8/2017 11:29:29 AM</u>
Email 2: _____	<small>additional email address to receive notifications about this form</small>
* Action Requested	
<input checked="" type="radio"/> Add New Vendor <input type="radio"/> Update Existing Vendor <input type="radio"/> Reactivate Existing Vendor <input type="checkbox"/> Expedite	
Identifying Information	

Date/Time	Description	User ID
04/06/2015 10:53:16 AM	Form submitted for agency approval by VDOT USER; Approval Request Emails were sent to ashlyn.jinnette@doa.virginia.gov	AGY510
04/06/2015 12:48:16 PM	Vendor Maintenance Form approved and submitted by VDOT APPROVER	AGY510A
04/10/2015 11:09:00 AM	Status updated by DOA to "In Review"	AGYDOA
04/10/2015 11:40:09 AM	Status updated by DOA to "Awaiting Further Information" - Please attach W9	AGYDOA
04/10/2015 12:04:03 PM	Form submitted for agency approval by VDOT USER; Approval Request Emails were sent to ashlyn.jinnette@doa.virginia.gov	AGY510
04/10/2015 12:48:16 PM	Vendor Maintenance Form approved and submitted by VDOT APPROVER	AGY510A
04/11/2015 12:57:30 PM	Status updated by DOA to "Approved"	ACT12345



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My Forms Page

- 1 The **My Forms** page allows agency users to access vendor maintenance request forms, review request forms, and filter/search upon different criteria relating to each request for their agency.

Department of Accounts Secure Forms

Last Update Range

to

Agency:

Form ID:

Description:

Form:

All ▼

Status:

Awaiting Agency Approval ▼

View

First 100 records:

	Last Update	Agency	Form ID	Description	Status	Attachments
Approve/Deny	10/21/2015	510	23	Vendor Maint Req -	Awaiting Agency Approval	--
Approve/Deny	10/21/2015	510	32	Vendor Maint Req -	Awaiting Agency Approval	--
Approve/Deny	10/21/2015	510	36	Vendor Maint Req -	Awaiting Agency Approval	--
Approve/Deny	10/21/2015	510	42	Vendor Maint Req -	Awaiting Agency Approval	--
Approve/Deny	10/21/2015	510	52	Vendor Maint Req -	Awaiting Agency Approval	--
Approve/Deny	10/21/2015	510	56	Vendor Maint Req -	Awaiting Agency Approval	--
Approve/Deny	10/21/2015	510	62	Vendor Maint Req -	Awaiting Agency Approval	--
Approve/Deny	10/21/2015	510	72	Vendor Maint Req -	Awaiting Agency Approval	--