Authorized Agent

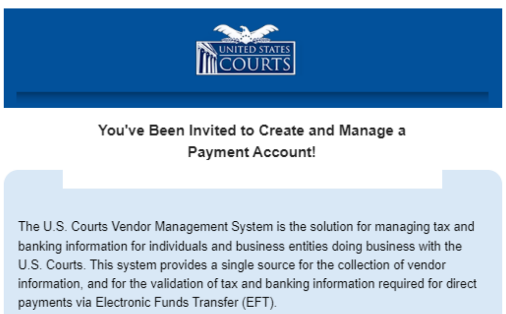
An Authorized Agent is an individual who is invited and authorized to provide and manage the vendor information in the Vendor Manager System (VMS). Authorized Agents may be vendors who have access to eVoucher or external users who do not have access to eVoucher and are restricted to only managing the payment account details, banking information, and tax information for their authorized users in the VMS. Only Authorized Agents who are invited to the VMS by a vendor may create an account and enter the application.

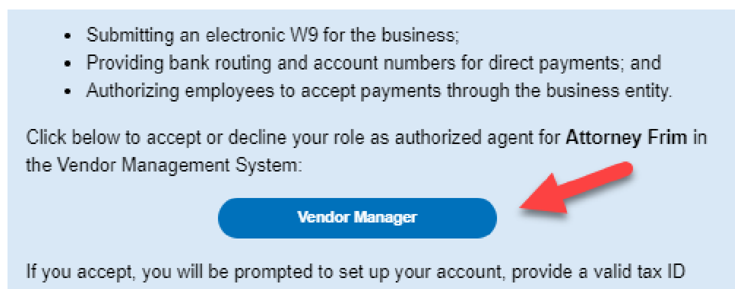
Note: If you do not have a Login.gov account, you will be prompted to create one before you can access the VMS.

Creating an Authorized Agent Account

Step 1

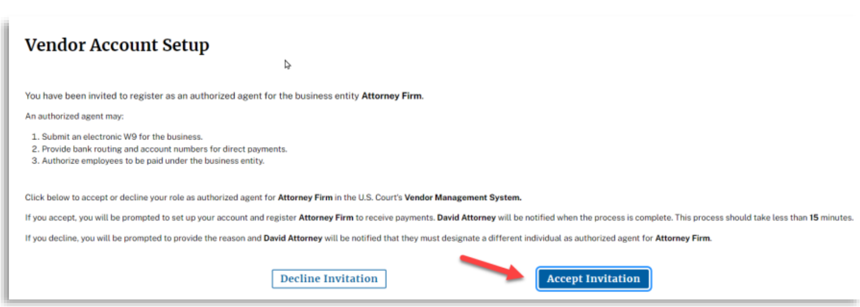
When a vendor invites you to join the VMS application as an authorized agent, you will receive a system-generated email with a brief description of the authorized agent role and a link to create a VMS account. In the email, click **Vendor Manager** if you agree to be the authorized agent for this vendor.





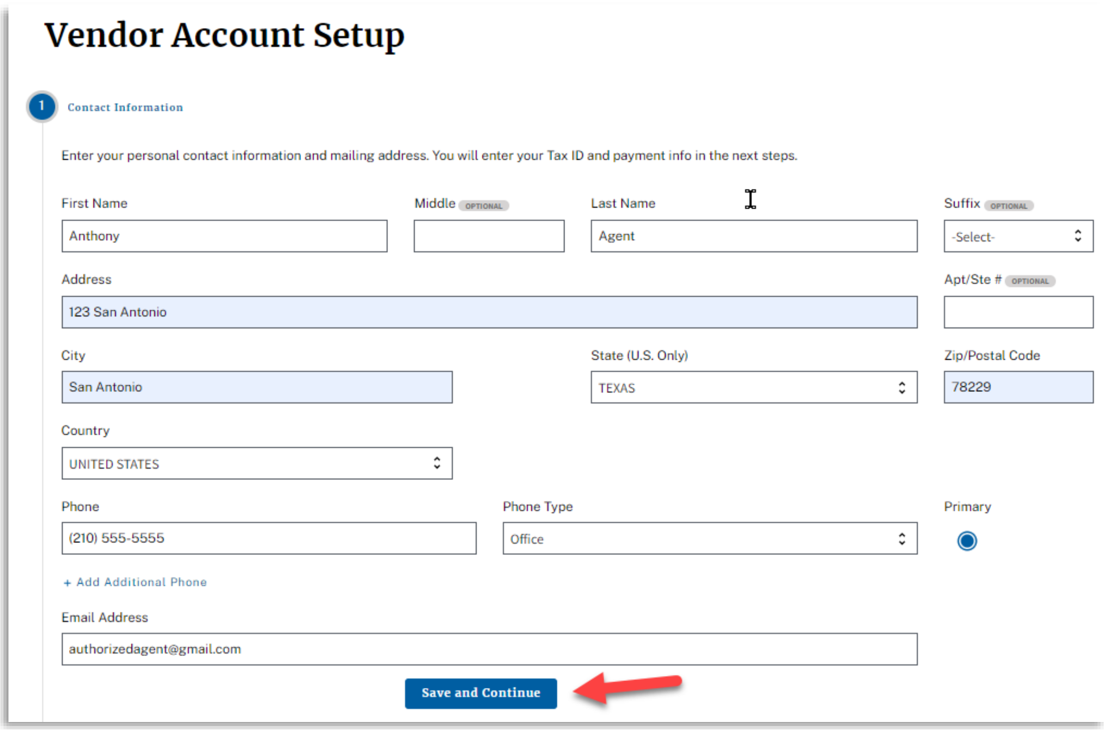
Step 2

From the Vendor Account Setup page, click **Accept Invitation**.



Step 3

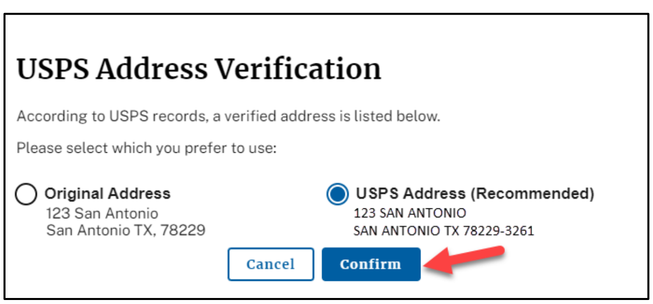
You are now prompted to set up your Vendor Account. Complete the Contact Information section. Your name and email address auto-populate, but you must complete the required **Address**, **City**, **State**, **Zip/Postal Code**, **Phone**, and **Phone Type** fields. Once you complete the fields, click **Save and Continue**.



Note: Some of your account information may have already been added by the vendor initially.

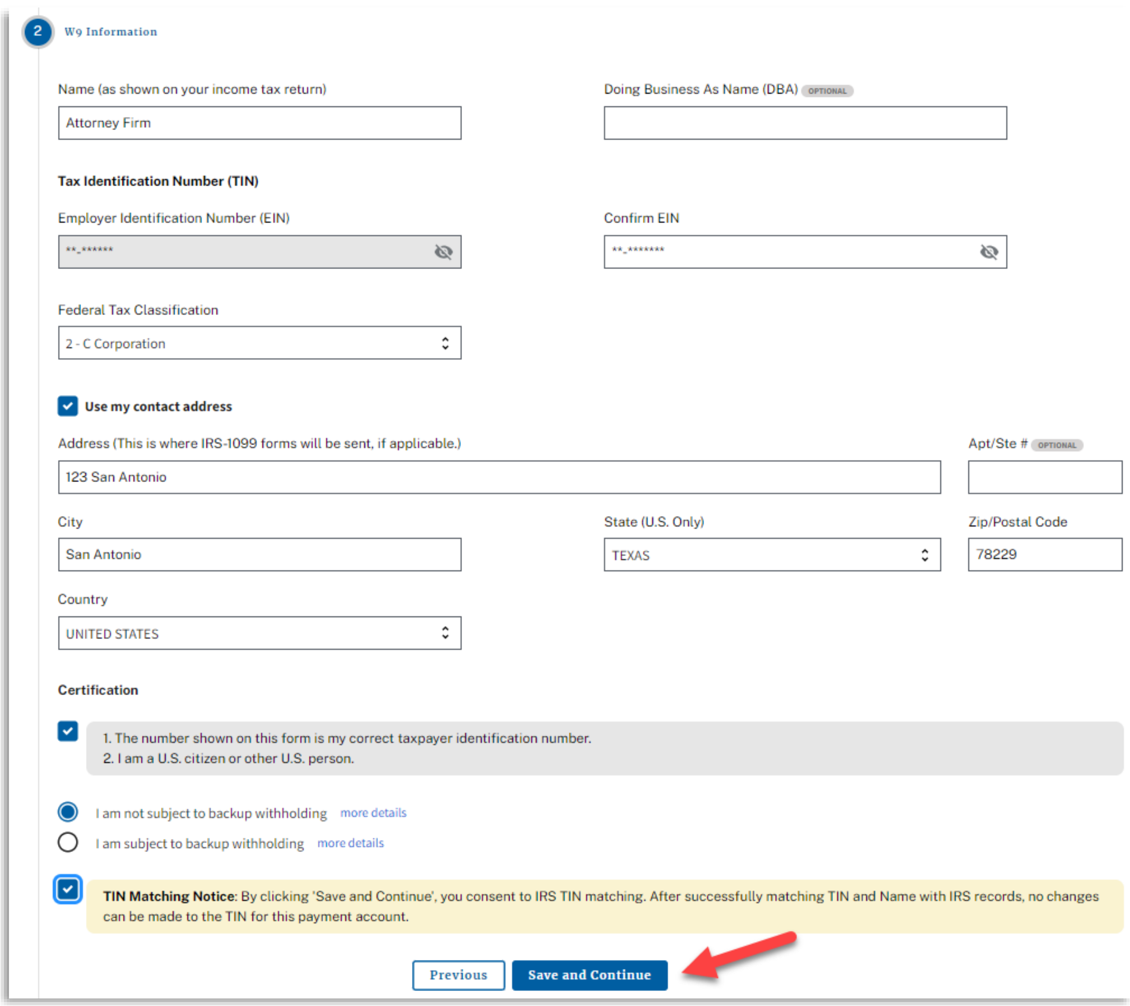
Step 4

The **USPS Address Verification** dialog box appears. Click a radio button to indicate the appropriate address format, and then click **Confirm**.



Step 5

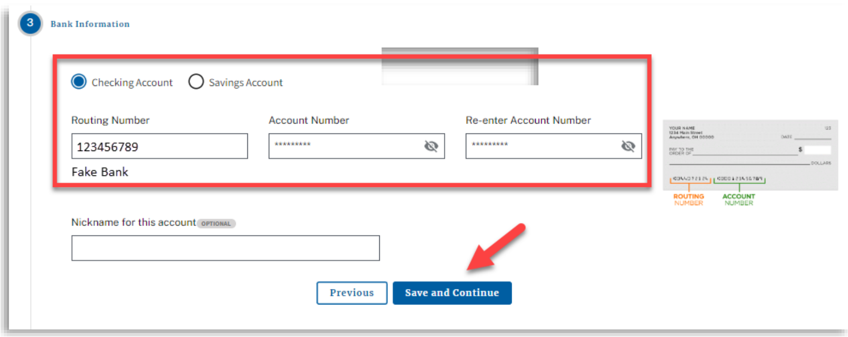
In the W9 Information section, enter the appropriate name, TIN, federal tax classification, and contact address—including city, state, zip code, and country—in the corresponding fields. Read the two withholding statements and click the appropriate radio button. Finally, read and confirm the TIN Matching Notice message, and then click **Save and Continue**.



Note: The system verifies your TIN and name against IRS records, and only on success can you proceed to the next step. If there is a mismatch, you must correct the TIN or name to continue the creation process.

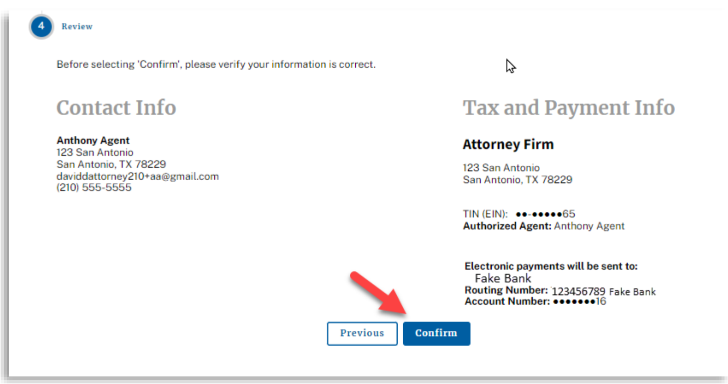
Step 6

Click a radio button to indicate if you are using a checking or savings account. Enter the bank routing and account numbers in the corresponding fields, reentering the account number to confirm. Click **Save and Continue**.



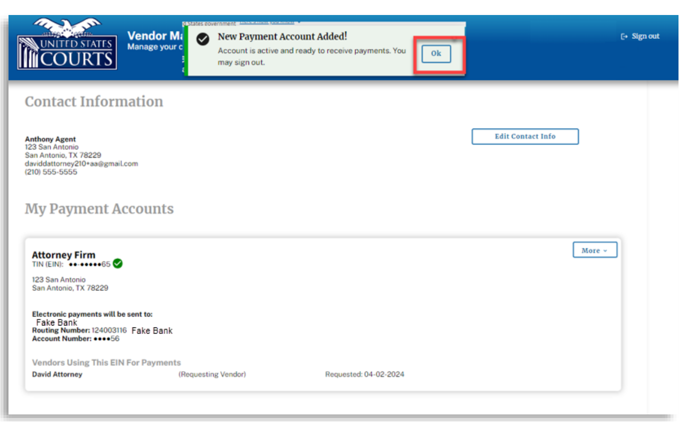
Step 7

Verify that the information you entered is correct, and then click **Confirm**. If anything is incorrect, click **Previous** to make changes.



Step 8

A New Payment Account Added! success message appears. Click **Ok**.

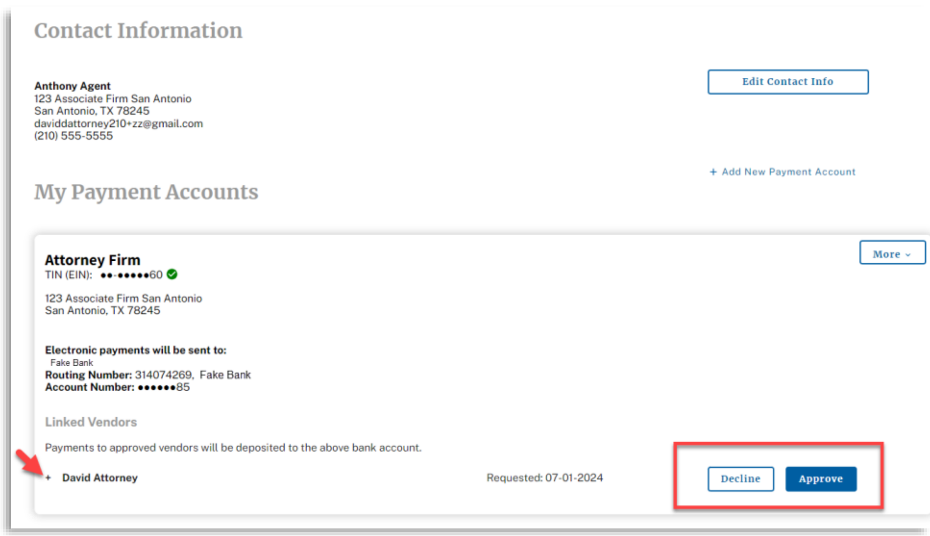


Note: Once your Authorized Agent account is created, other vendors may now also request to link to your payment account.

Approving a Request to Link a Vendor Account

Step 1

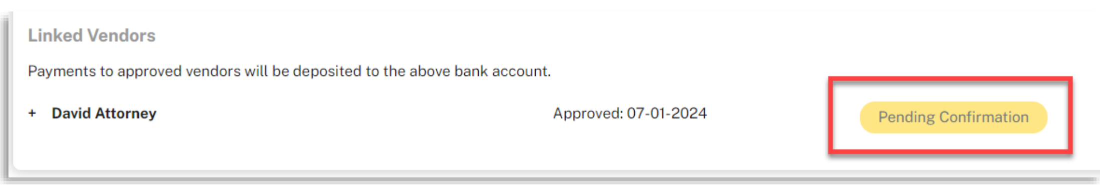
Once your authorized agent payment account is created, you can approve requests from other vendors to link to your payment account. On your VMS homepage, select the vendor(s) who have requested to link to your approved payee account and either decline or approve them. The vendor will receive an email confirming the linked payment account.



Note: To view more information on each vendor, click the plus icon (**+**).

Step 2

The linked vendor account will display **Pending Confirmation** until the vendor confirms the account.



You can now sign out of the application. **Authorized Agents who are not eVoucher users should bookmark the URL included in the initial invitation email for direct access to VMS at a later date.**