

Authorized Agent

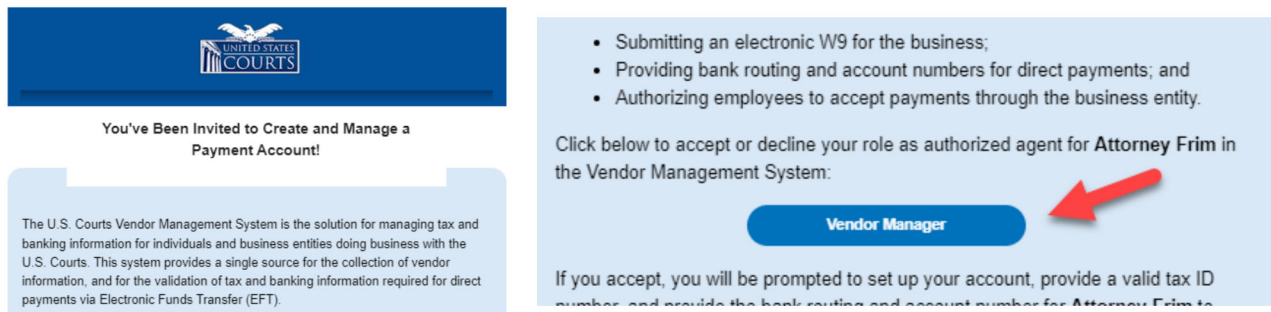
An Authorized Agent is an individual who is invited and authorized to provide and manage the vendor information in the Vendor Manager System (VMS). Authorized Agents may be vendors who have access to eVoucher or external users who do not have access to eVoucher and are restricted to only managing the 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

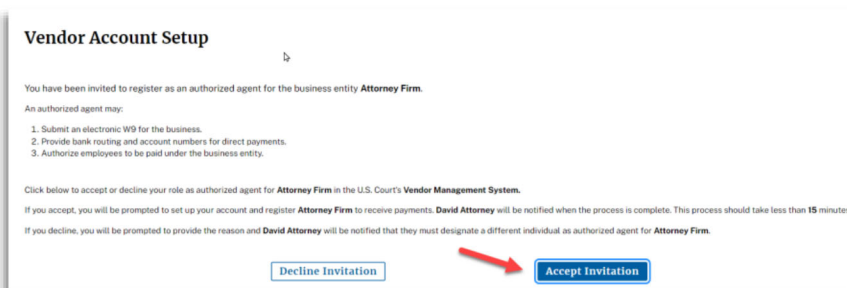
When a vendor invites you to join the VMS application as an authorized agent, you will receive a system-generated email with a brief description of the authorized agent role and a link to create a VMS account. In the email, click **Vendor Manager** if you agree to be the authorized agent for this vendor.



The screenshot shows an email from the U.S. Courts with the subject "You've Been Invited to Create and Manage a Payment Account!". The email body explains the VMS and lists three responsibilities: submitting an electronic W9, providing bank routing and account numbers, and authorizing employees. It includes a blue button labeled "Vendor Manager" with a red arrow pointing to it. Below the button, it states that accepting will prompt the user to set up their account and provide a valid tax ID number and bank routing and account numbers for Attorney Firm.

Step 2

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



The screenshot shows the "Vendor Account Setup" page. It states that the user has been invited to register as an authorized agent for the business entity "Attorney Firm". It lists the same three responsibilities as the email. At the bottom, there are two buttons: "Decline Invitation" and "Accept Invitation", with a red arrow pointing to the "Accept Invitation" button.

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**.

Vendor Account Setup

1 Contact Information

Enter your personal contact information and mailing address. You will enter your Tax ID and payment info in the next steps.

First Name: Anthony Middle (OPTIONAL): Last Name: Agent Suffix (OPTIONAL): -Select-

Address: 123 San Antonio Apt/Ste # (OPTIONAL):

City: San Antonio State (U.S. Only): TEXAS Zip/Postal Code: 78229

Country: UNITED STATES

Phone: (210) 555-5555 Phone Type: Office Primary: ☒

+ Add Additional Phone

Email Address: authorizedagent@gmail.com

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**.

USPS Address Verification

According to USPS records, a verified address is listed below.

Please select which you prefer to use:

☐ **Original Address**
123 San Antonio
San Antonio TX, 78229

☒ **USPS Address (Recommended)**
123 SAN ANTONIO
SAN ANTONIO TX 78229-3261

Cancel **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**.

2 W9 Information

Name (as shown on your income tax return)
Attorney Firm

Doing Business As Name (DBA) (OPTIONAL)

Tax Identification Number (TIN)

Employer Identification Number (EIN)
XX-XXXXXX

Confirm EIN
XX-XXXXXX

Federal Tax Classification
2 - C Corporation

☒ Use my contact address

Address (This is where IRS-1099 forms will be sent, if applicable.)
123 San Antonio

Apt/Ste # (OPTIONAL)

City
San Antonio

State (U.S. Only)
TEXAS

Zip/Postal Code
78229

Country
UNITED STATES

Certification

☒ 1. The number shown on this form is my correct taxpayer identification number.
2. I am a U.S. citizen or other U.S. person.

☐ I am not subject to backup withholding [more details](#)

☐ I am subject to backup withholding [more details](#)

☒ **TIN Matching Notice:** By clicking 'Save and Continue', you consent to IRS TIN matching. After successfully matching TIN and Name with IRS records, no changes can be made to the TIN for this payment account.

[Previous](#) [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.

Contact Information

Anthony Agent
123 Associate Firm San Antonio
San Antonio, TX 78245
davidattorney210+zz@gmail.com
(210) 555-5555

Edit Contact Info

My Payment Accounts

+ Add New Payment Account

Attorney Firm
TIN (EIN): *****60
123 Associate Firm San Antonio
San Antonio, TX 78245

More

Electronic payments will be sent to:
Fake Bank
Routing Number: 314074269, Fake Bank
Account Number: *****85

Linked Vendors

Payments to approved vendors will be deposited to the above bank account.

+ David Attorney Requested: 07-01-2024

Decline Approve

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.

Linked Vendors

Payments to approved vendors will be deposited to the above bank account.

+ David Attorney Approved: 07-01-2024

Pending Confirmation

You can now sign out of the application.

