



NEW SUPPLIER REQUEST FORM / CHANGE FORM

New Supplier Updated Information Vendor # _____

H&R Block (or its subsidiary companies) can make payments to you or your company via credit card (**preferred method**), electronic funds transfers (EFT) or paper checks. Credit Card and EFT payments will receive a payment advice emailed to you or your company when each payment is made. Until the setup process is complete for Credit Card or EFT payments you will continue to receive payments in paper check form.

Form Instructions: To become an approved H&R Block supplier you must complete all three sections of the form below and sign for authorization. Send completed form to **ACCOUNTSPAYABLEVENDORS@HRBLOCK.COM**

- SECTION ONE** - Supplier Classification and Contact Information
- SECTION TWO** - Agreement to H&R Block's Payment Term Policies
- SECTION THREE** - Agreement to H&R Block's Invoice Submission Policies

SECTION ONE – SUPPLIER CLASSIFICATION AND CONTACT INFORMATION

Name as Displayed on Invoices: (Please provide sample invoice)	Tax ID: (Please provide copy of W9)
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REMITTANCE INFORMATION			
Remit Address:	City:	State:	Zip:
Accounts Receivable\Billing Email Address: (Required for emailed remittance advice)			

CONTACT INFORMATION	
Telephone:	Website:
1099 Email Address: (Required to receive 1099 Misc by email)	Purchase Order Dispatch Email Address: (Required to receive PO)

SECTION TWO – PAYMENT METHOD & TERM SELECTION

OPTION 1 – VISA CREDIT CARD (H&R BLOCK'S PREFERRED PAYMENT METHOD)	
Yes, please contact me to be paid via Virtual Credit Card at NET15 <small>(Will receive a one-time use credit card number by email from US Bank)</small>	Payment Terms: NET15
For more information please visit: https://www.usbpayment.com/payables-solutions/electronic/virtual-payments-supplier or call 1 (855) 268-5386	

OPTION 2 – ELECTRONIC FUNDS TRANSFER (BANK ACCOUNT INFORMATION)	
Yes, I agree to be paid EFT at NET45	Payment Terms: NET45
Bank ABA Transit Number: (Must be 9 digits)	Bank Account Number:
Bank Name:	
Name on Account: (As shown on bank records)	Click to Lock Banking Information

OPTION 3 – PAPER CHECK	
Yes, I agree to be paid via Check at NET60	Payment Terms: NET60

CONTRACTUAL TERMS

If you have a signed contractual agreement that states agreed upon payment terms please provide a copy of the contract with the submission of this form and the terms will be honored. Please also select the above payment method.

Yes, I have contractual payment terms that have been agreed upon	Payment Terms:
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INVOICES UNDER \$500 SHOULD BE PAID ON H&R BLOCK REQUESTER'S CORPORATE CARD. NEW VENDOR FORM NOT NEEDED

SECTION THREE – COUPA SUPPLIER PORTAL (CSP)

The CSP is a completely free network with no contracts required to join. To connect to the CSP, an invitation needs to be emailed to the primary Coupa account holder and accepted.

Email for CSP Invitation:

How Invoices Should be provided to H&R Block

- **Non Purchase Order invoices** must be submitted via the CSP.*

Required: Please ensure the H&R Block associate's name or email that the invoice should be routed to for approval is populated in the REQUESTER fields.

- **Purchase Order invoices** must be submitted in one of three ways below:

1. The PO must be flipped utilizing the Supplier Actionable Email you received with your PO email.
2. POs may be flipped into invoices by logging into your CSP account
3. A cXML direct connection between your ERP and Coupa can be setup to facilitate high volume transactions

How to Check Invoice & Payment Status with H&R Block

All status inquiries should be done through the CSP (<https://supplier.coupahost.com/>)

*If due to system limitations you are unable to join the CSP, you may email your non-PO invoices to APInvoices@HRBlock.com.

Required: The invoice must be in a non-editable format (preferably PDF or TIFF) and must include the H&R Block associate's name that the invoice should be routed to for approval. Failure to do so will result in your invoice being rejected.

Email H&R Block will receive invoices from:
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AUTHORIZATION

The undersigned authorizes H&R Block, or its subsidiaries, to make either credit card or electronic funds transfer (EFT) payments, as well as any necessary adjustments involving these deposits, in the account defined and authorizes the institution defined to accept these deposits and make any necessary adjustments. This authorization will remain in effect until written notice of termination is delivered to H&R Block. The undersigned agrees to be paid and to submit invoices according to H&R Block's Payment Terms Policy and Invoice Submission Guidelines as previously noted in this document. Failure to comply may result in delays in payment at which H&R Block will not be liable for any late penalties.

Name & title of person completing this form (please print):	
Authorization Signature:	Date: