

STATE OF MONTANA Office of State Public Defender

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OPD Vendor Registration Guide

The Office of State Public Defender utilizes the Montana Acquisition and Contracting System, known as eMACS, for MOU creation and management. Each contractor approved to receive an MOU is required to complete a Vendor Profile on the eMACS website. In addition to being required to receive an MOU, the eMACS Vendor Profile also allows you to receive advance notice of proficiency determination obligations or MOU expiration. This guide will walk you through the registration process in detail.

You will need the same email and password you used when applying for a MOU.

To jump directly to a section of the registration guide, simply click on the title below.

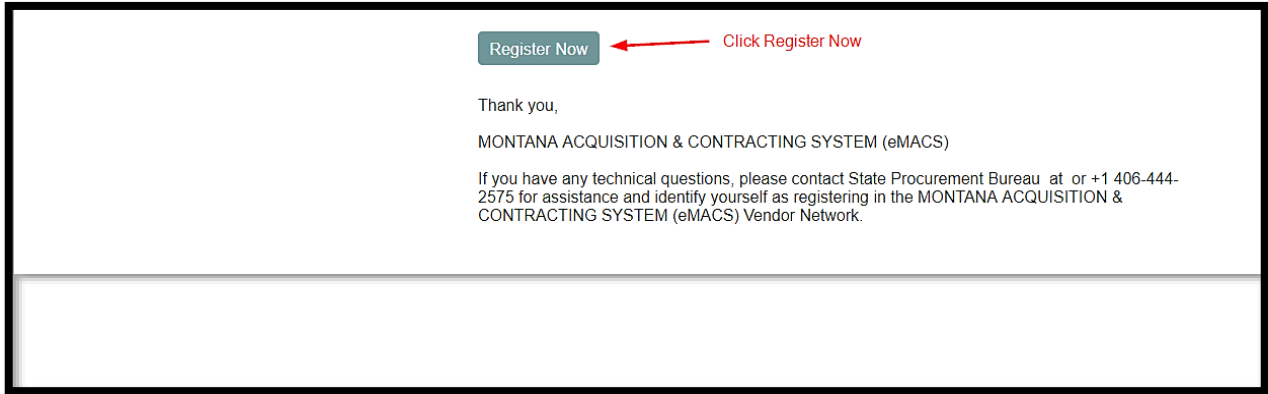
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Please Follow These Instructions Exactly to Avoid

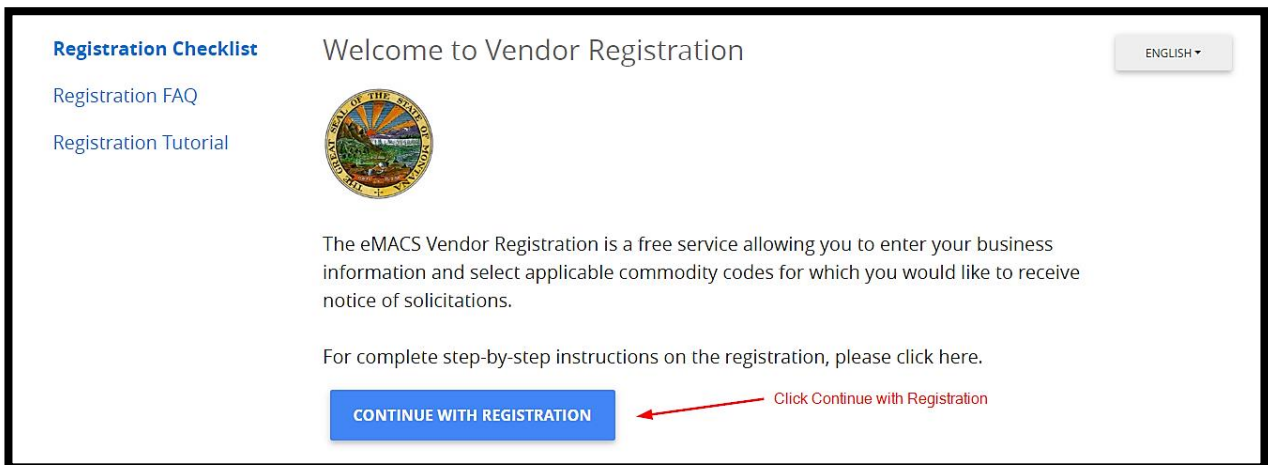
Unnecessary Errors or Issues with Your Registration

Accessing the eMACS Vendor Registration


When you have been approved to receive an MOU, you will receive an email invite from eMACS to complete your registration. Simply click the “Register Now” button within the email:



Once the page has loaded, click “Continue with Registration” as shown below:




You will next be taken to a login screen where you will enter the **same email and password used when applying for an MOU** and then click “Login”:

 ENGLISH ▾

Welcome to Montana Acquisition & Contracting System (eMACS) Vendor Registration

Register to be placed on Montana's eMACS Vendor List. This is a free service allowing vendors to enter their business information and select applicable commodity codes for which they would like to receive bid notifications. This list also serves as a centralized source for state agencies when looking for providers of goods and services.

 **Please login and complete registration.**

Please log in to complete registration.

Email
brett.schandelson@mt.gov

Password
.....

LOGIN [TROUBLE LOGGING IN?](#)

This will then launch the eMACS Registration Wizard.

eMACS Vendor Registration Wizard

The following steps occur within the eMACS Vendor Registration wizard. Instructions for each section are found below. You can move forward and back throughout the registration and save your progress at any time. When a section has been completed a green check will appear. Each section must have a green check to complete your registration.

1. Welcome

On the Welcome screen, you will be asked to provide your “Legal Company Name.”

- For registration as an OPD Vendor, please enter **YOUR NAME** here. You will complete information about your firm or business in the next section.

Brett Schandelson

Registration In Progress for:
MONTANA ACQUISITION &
CONTRACTING SYSTEM (eMACS)

1 of 8 Steps Complete

Welcome

The eMACS Vendor Registration is a free service allowing you to enter your business information and select applicable commodity codes for which you would like to receive notice of solicitations.

For complete step-by-step instructions on the registration, please click here.

Required to Start Registration

Legal Company Name * Enter YOUR NAME as the Legal Company Name

★ Required to Complete Registration

Next > Save Changes

Please use YOUR name, NOT the name of your firm or business on this screen.

2. Company Overview

In the Company Overview section, you will be asked for more information about your business. If you operate as firm or business entity, this is where you will enter that information.

- If you work for, or do business as, a firm, business, or legal entity, enter that name in the “Doing Business As” section.
- Select the appropriate legal structure for the **entity** and provide the **entity’s** Tax ID.
- A DUNS number is **not required**, though enter it if you have one.
- Provide your business’s Montana Secretary of State registration number.

Company Overview ?

The information entered on this page allows us to track general information about your company to ensure we have the most up-to-date information in our system.

Doing Business As (DBA) **Enter Your Business Name Here**

Country of Origin

Does your business have a DUNS number? Yes No

Legal Structure is used by the IRS to classify the form of a business organization and ultimately determines which tax documentation is required. Please provide the appropriate Legal Structure information as it is currently stated with the IRS. For more information about business structures, please visit www.irs.gov.

Legal Structure **Select the Correct Legal Structure**

Tax ID Number **Enter Your Business's Tax ID#**

Website

Additional Questions

Are you Registered with Secretary of State Office? Businesses intending to transact business in MT must register with Secretary of State, per § 35-1-1026 and 35-8-1001, MCA. For information please call (406) 444-3665 or visit <http://sos.mt.gov>.

Yes
 No

Please provide your registration number **Provide Your Montana Secretary of State Registration #**

Are you a Construction Contractor? Construction contractors register with Department of Labor and Industry per Montana Code Annotated §39-9-201. For further information please visit <http://erd.dli.mt.gov/work-comp-regulations/montana-contractor>

Yes
 No

★ Required to Complete Registration

Click Next

3. Business Details

In the Business Details section, you will be asked to select a Commodity Code. All OPD MOUs are under the 3920 (Professional Services – Legal Services) Commodity Code.

- Click Edit to bring up a list of commodity codes.
- Enter “Legal” to search for the correct code.
- Click on 3920 (Professional Services – Legal Services).
- Click Done, then click Next.

Commodity Codes

Use Search or browse the list to select applicable Commodity Codes. You can select multiple before clicking Done.

Legal ← Type Legal

Search ← Click Search

1 Selected Codes

Showing 1 - 1 of 1 Results

Results Per Page 20 Sort by: Commodity Code Page 1 of 1 ?

Commodity Code	Description
3920	Professional Services - Legal Services

Click Done → Done Close

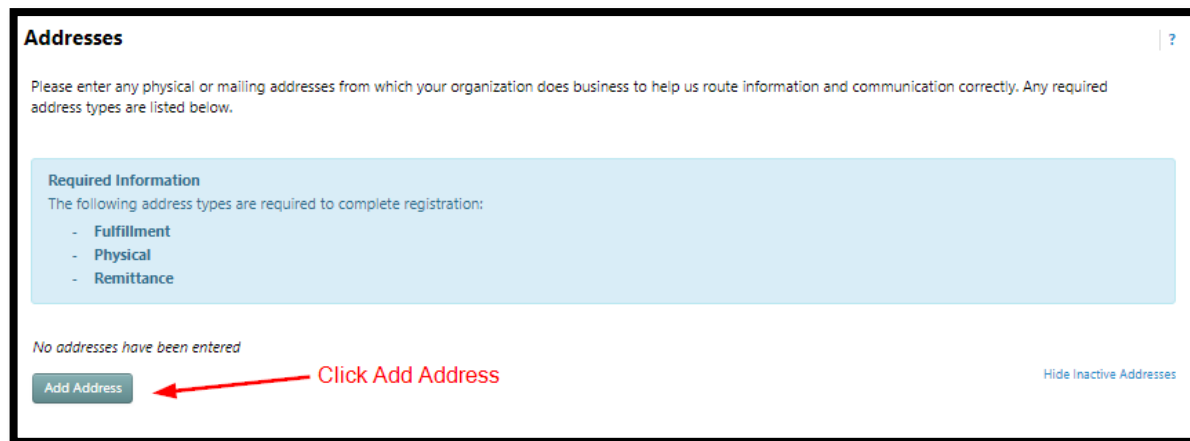
Please note that if you enter any commodity code other than 3920 (Professional Services – Legal Services) you will receive notices of Statewide contracting opportunities in those areas.

Only enter additional commodity codes if you understand this and want to be notified of such opportunities.

4. Addresses

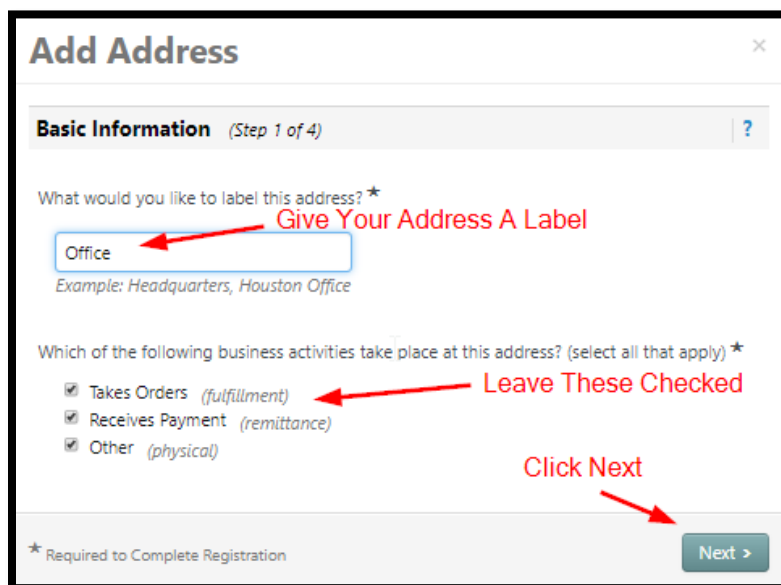
In the Addresses section, you will be required to add a business address. You will also add a contact and location through the Addresses Wizard.

- Click Add Address. This will launch the Address Wizard which will guide you through the rest of this section.



The screenshot shows the 'Addresses' section of a registration wizard. At the top, it says 'Addresses' with a help icon. Below that, a message reads: 'Please enter any physical or mailing addresses from which your organization does business to help us route information and communication correctly. Any required address types are listed below.' A light blue box titled 'Required Information' contains the text: 'The following address types are required to complete registration:' followed by a list: '- Fulfillment', '- Physical', and '- Remittance'. Below this, it says 'No addresses have been entered'. At the bottom left is a button labeled 'Add Address', with a red arrow pointing to it and the text 'Click Add Address' next to it. At the bottom right is a link that says 'Hide Inactive Addresses'.

- Give your address a label, such as Office. Leave all three checkmarks selected. Click Next.



The screenshot shows the 'Add Address' wizard, Step 1 of 4. The title is 'Add Address' with a close icon. Below the title is 'Basic Information (Step 1 of 4)' with a help icon. The first question is 'What would you like to label this address? *'. The input field contains 'Office', with a red arrow pointing to it and the text 'Give Your Address A Label' next to it. Below the input field is the example text: 'Example: Headquarters, Houston Office'. The second question is 'Which of the following business activities take place at this address? (select all that apply) *'. There are three checkboxes, all of which are checked: 'Takes Orders (fulfillment)', 'Receives Payment (remittance)', and 'Other (physical)'. A red arrow points to the checked boxes with the text 'Leave These Checked'. At the bottom right is a button labeled 'Next >', with a red arrow pointing to it and the text 'Click Next' next to it. At the bottom left, there is a note: '* Required to Complete Registration'.

- Enter your business address and click Next.

- Enter your information as a contact.
- Check the “Sales” box.
- Uncheck “Create New User Account.”
- Click Next.

- Add a label and description to your address.

Add Address ×

Assign this Address to a Location (Step 4 of 4) ?

You can also update and add Locations later from the Locations page.

Locations represent the various places in which your business operates. Some examples of locations are regional offices, fulfillment centers, divisions, etc. If your organization only operates out of one location, please enter "Main Office" for the Location Label.

Enter New Location

What would you like to label this location? *

Office ← Add Label

Location Type *

Headquarters ▼

Description *

Home Office ← Add Description

689 characters remaining

* Required to Complete Registration

< Previous Save Changes ← Click Save Changes

- You should now see your address listed in the Address section. Click Next.

Addresses ?

Please enter any physical or mailing addresses from which your organization does business to help us route information and communication correctly. Any required address types are listed below.

Address Label	Address Types	Address	
Office	Physical (Primary) Fulfillment (Primary) Remittance (Primary)	610 Woody Street Missoula, MT 59802 US	Edit ▼

Add Address Show Inactive Addresses

5. Contacts

- If you added your contact correctly in the previous section, you will see it listed here. Click Next.

Contacts

Please enter contact information for any individuals at your organization who may provide valuable information or help to our company. This will help us ensure we are always contacting the correct individual. Contacts can be linked to one existing address. Any required contact types are listed below.

Contact Label	Contact Types	Name	Email	
Brett Schandelson	Sales (Primary) Fulfillment (Primary) Remittance (Primary) Other (Primary)	Schandelson, Brett	brettschandelson@mt.gov	Edit

[Add Contact](#) [Show Inactive Contacts](#)

6. Locations

- If you added your address correctly, you will see it listed here. Click Next.

Locations

Locations can be used to organize contacts and addresses. For instance, if your company operates from multiple addresses in one vicinity on the East Coast, you can create an East Coast location and designate appropriate contacts and locations.

Location Label	Location Type	
Office	Headquarters (Primary)	Edit

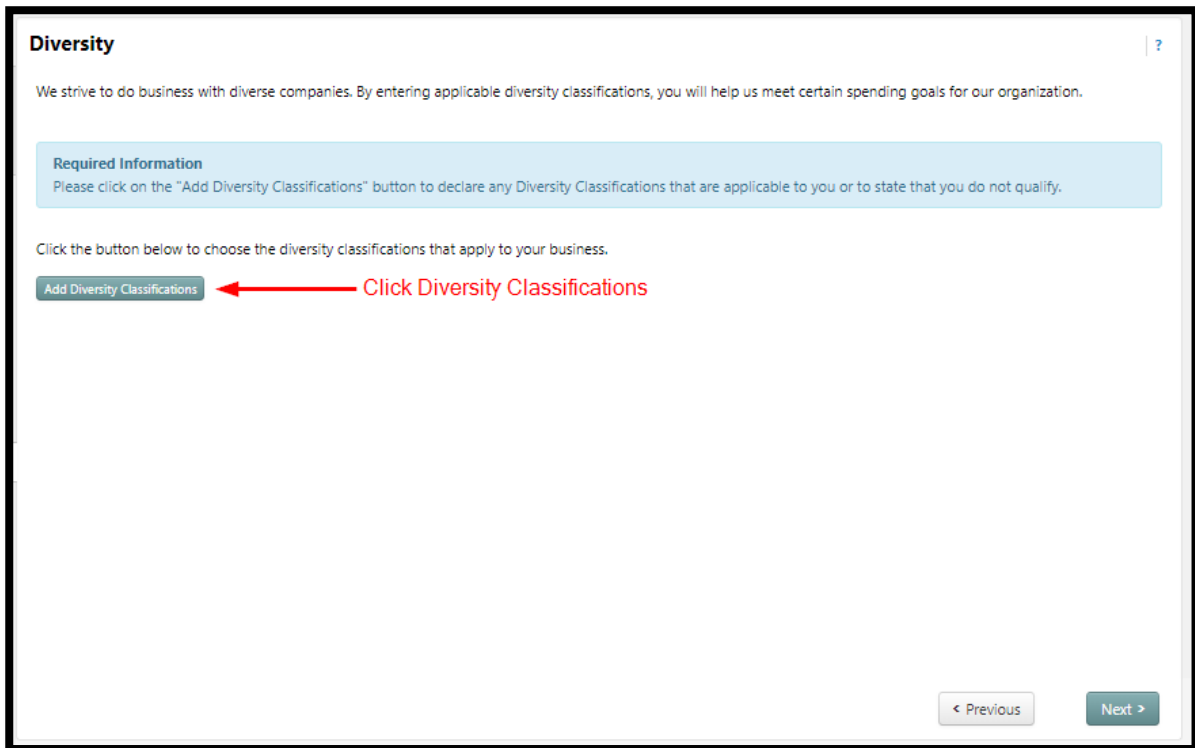
[Add Location](#) [Hide Inactive Locations](#)

[< Previous](#) [Next >](#)

7. Diversity

In the Diversity section you will be asked to select any applicable diversity classifications or decline to respond.

- Click “Add Diversity Classifications”



Diversity | ?

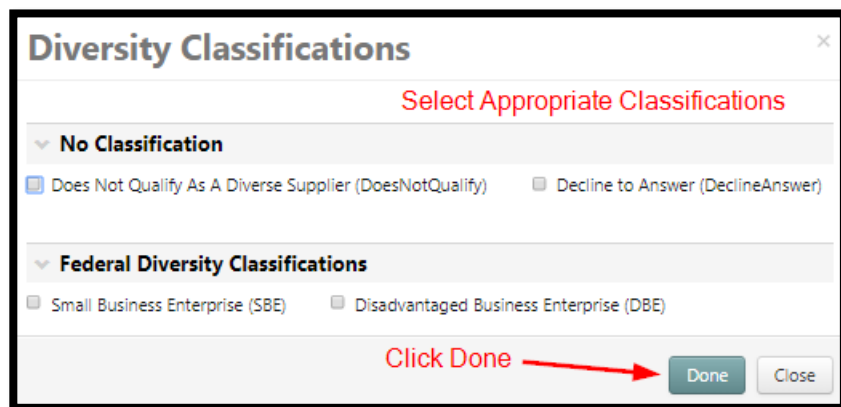
We strive to do business with diverse companies. By entering applicable diversity classifications, you will help us meet certain spending goals for our organization.

Required Information
Please click on the “Add Diversity Classifications” button to declare any Diversity Classifications that are applicable to you or to state that you do not qualify.

Click the button below to choose the diversity classifications that apply to your business.

← Click Diversity Classifications

- Check the appropriate classifications or Decline to Answer, and click Done.



Diversity Classifications ×

Select Appropriate Classifications

▼ **No Classification**

Does Not Qualify As A Diverse Supplier (DoesNotQualify) Decline to Answer (DeclineAnswer)

▼ **Federal Diversity Classifications**

Small Business Enterprise (SBE) Disadvantaged Business Enterprise (DBE)

Click Done →

- Click Next.

8. Payment Information

In the Payment Information section, you will be asked to provide the necessary information to receive payment for your services from OPD.

- Click “Add Payment Information”
- Select whether you’d like to receive payment via ACH (Direct Deposit) or check (mailed).

Payment Information ?

Information on this page is used to determine how and where you will receive payment.
If you have any Account Payable questions please contact the State Accounting Bureau helpdesk at (406) 444-3092.

Required Information
At least one payment type is required to complete this section.

No payment information has been entered.

Add Payment Information ← Click Add Payment Information

Additional Questions

Did you select ACH as Payment Method? *

Yes
 No

< Previous Next > Save Changes

- Fill out your banking information for ACH or mailing information for Check and Click “Save Changes.”

No payment information has been entered.

Add Payment Information ▼

Direct Deposit (ACH)

Check

Additional Questions

Did you select ACH as Payment Method? *

Yes
 No

- If you've selected ACH, select "Yes" and upload either a voided check or Direct Deposit form from your bank, then click Next.

Payment Information ?

Information on this page is used to determine how and where you will receive payment.
If you have any Account Payable questions please contact the State Accounting Bureau helpdesk at (406) 444-3092.

Title ▾	Payment Type	Currency	Active	
Checking	Direct Deposit (ACH)	USD	Yes	Edit

[Add Payment Information ▾](#)

Additional Questions

Did you select ACH as Payment Method? *

Yes ← Select Yes if You've Chosen to Recieve Payment via ACH

No

Direct Deposit (ACH) Documentation (Direct Deposit form signed by bank representative or copy of a voided check) *

[Select file](#) Done ✓

Voiced Check.pdf ↓ 100% ×

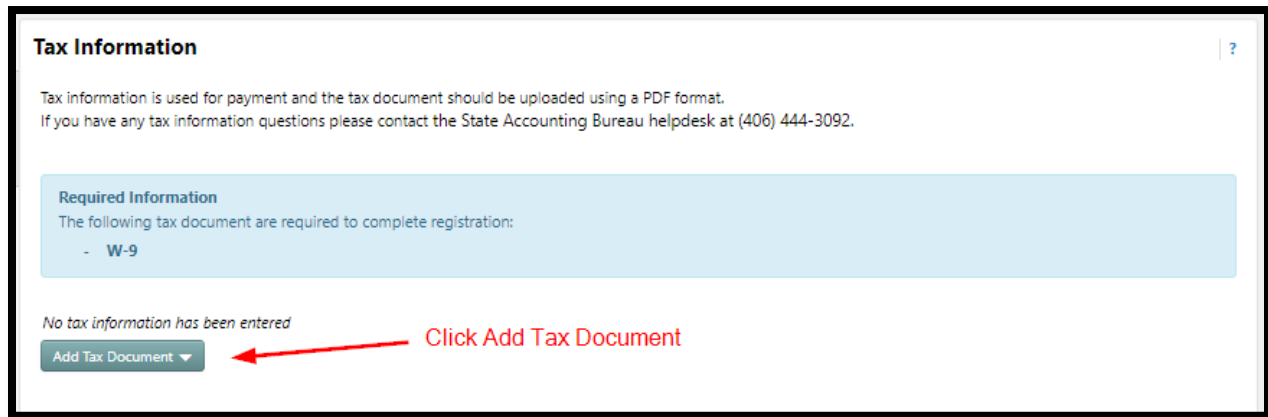
Click Next

[< Previous](#) [Next >](#) [Save Changes](#)

9. Tax Information

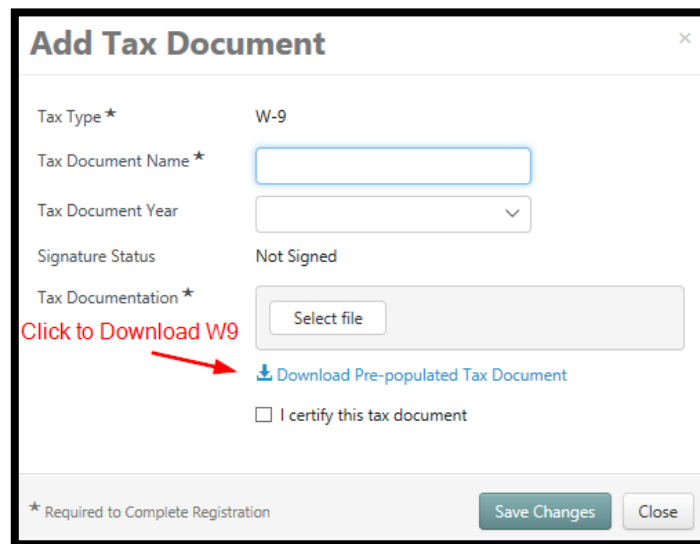
In the Tax Information section, you'll be asked to provide a W9 form. You'll be able to generate a pre-populated W9 and electronically sign it within the registration wizard.

- Click "Add Tax Document"
- Select W9.



The screenshot shows the 'Tax Information' section of a registration wizard. At the top, it says 'Tax Information' with a help icon. Below that, a message states: 'Tax information is used for payment and the tax document should be uploaded using a PDF format. If you have any tax information questions please contact the State Accounting Bureau helpdesk at (406) 444-3092.' A light blue box titled 'Required Information' contains the text: 'The following tax document are required to complete registration: - W-9'. Below this, a message says 'No tax information has been entered'. At the bottom left, there is a button labeled 'Add Tax Document' with a dropdown arrow. A red arrow points from the text 'Click Add Tax Document' to this button.

- Next, click on "Download Pre-populated Tax Document"



The screenshot shows the 'Add Tax Document' form. It has a title bar with 'Add Tax Document' and a close button. The form contains the following fields and options:

- Tax Type *: W-9
- Tax Document Name *:
- Tax Document Year:
- Signature Status: Not Signed
- Tax Documentation *:
- [Download Pre-populated Tax Document](#) (with a download icon)
- I certify this tax document

At the bottom left, there is a note: '* Required to Complete Registration'. At the bottom right, there are two buttons: 'Save Changes' and 'Close'. A red arrow points from the text 'Click to Download W9' to the 'Download Pre-populated Tax Document' link.

- Open the Downloaded W9 and complete it. Ensure the W9 reflects your firm, business, or legal entity's information, which, except for the name, should be prepopulated.
- Once you are sure the information in the W9 is correct, save the document.

Form (Rev. November 2017) Department of the Treasury Internal Revenue Service	<h2 style="margin: 0;">Request for Taxpayer Identification Number and Certification</h2> <p style="margin: 0;">▶ Go to www.irs.gov/FormW9 for instructions and the latest information.</p>	Give Form to the requester. Do not send to the IRS.
<p>1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.</p> <p>Schandellaw LLC ← Enter Your Business's Name</p>		
<p>2 Business name/disregarded entity name, if different from above</p>		
<p>3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes.</p> <p><input type="checkbox"/> Individual/sole proprietor or single-member LLC</p> <p><input type="checkbox"/> C Corporation</p> <p><input checked="" type="checkbox"/> S Corporation</p> <p><input type="checkbox"/> Partnership</p> <p><input type="checkbox"/> Trust/estate</p> <p><input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶</p> <p>Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.</p> <p><input type="checkbox"/> Other (see instructions) ▶</p>	<p>4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):</p> <p>Exempt payee code (if any) _____</p> <p>Exemption from FATCA reporting code (if any) _____</p> <p><small>(Applies to accounts maintained outside the U.S.)</small></p>	
<p>5 Address (number, street, and apt. or suite no.) See instructions.</p> <p>610 Woody Street</p>		Requester's name and address (optional)
<p>6 City, state, and ZIP code</p> <p>Missoula, MT 59802</p>		
<p>7 List account number(s) here (optional)</p>		
<p>Part I Taxpayer Identification Number (TIN)</p> <p>Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see <i>How to get a TIN</i>, later.</p> <p>Note: If the account is in more than one name, see the instructions for line 1. Also see <i>What Name and Number To Give the Requester</i> for guidelines on whose number to enter.</p>		
		Social security number _____ - _____ - _____
		or Employer identification number 2 7 - _____

- Next, upload the saved W9 into the Registration Window, check the box to certify, name the tax document, select the tax year, and type your Vendor Portal password to electronically sign the W9, and click “Save Changes.”

- Confirm the information on this screen is correctly entered and click Next.

10. Certify & Submit

In the Certify & Submit section, you will finalize your Vendor Registration and click Submit.

- Ensure all sections have been completed and have green checks.
- Add your title.
- Check the box to certify your registration.
- Click Submit.

Brett Schandelson

Registration **In Progress** for:
MONTANA ACQUISITION &
CONTRACTING SYSTEM (eMACS)

8 of 8 Steps Complete

Welcome **Make Sure All Sections Have Green Check**

- Company Overview ✓
- Business Details ✓
- Addresses ✓
- Contacts ✓
- Locations ✓
- Diversity ✓
- Payment Information ✓
- Tax Information ✓

Certify & Submit

Please type your initials in the box below acknowledging that you are a company official and that all information is correct. It is the Supplier's responsibility to ensure company information is accurate and that company information is kept current. Inaccurate company information may result in payment delays.

Additionally, by submitting this registration, you certify all information provided is true and accurate. Knowingly providing false information may result in disqualifying you or your company from doing business with us.

Preparer's Initials *

Preparer's Name *

Preparer's Title * **Add Your Title**

Preparer's Email Address *

Today's Date 7/24/2018

Certification * I certify that all information provided is true and accurate.

Check this Box to Certify Your Registration

Click Submit

★ Required to Complete Registration

You will see this screen when your registration is complete.

Thank You for Registering

✓ Registration Complete for Brett Schandelson!

Next Steps

- You will receive a confirmation email with information on what to expect next.
- Bookmark this site in your browser so you can easily make updates to your business profile.
- Send new user request to an additional portal user.
- Return to the homepage and check for any other outstanding tasks.
- Return to Registration Profile

Congratulations, you have completed your OPD eMACS Vendor Registration!