

CAMS TRUSTED GUIDANCE

NEW SERVICE PROVIDERS

Resource for Easy Onboarding



This guide makes getting setup as a trusted service provider as easy as 1-2-3! We know your work is important to you, and we want to help make the business of working with the associations we manage easy! Follow the steps below for quick entry into the CAMS system.

ONBOARDING MADE EASY FOR OUR SERVICE PROVIDERS

○ GATHER THE DOCUMENTS REQUIRED FOR SETUP

1. **W9:** All Service Providers are required to provide a current W9 with a valid Federal Tax ID number or Social Security number.
2. **Certificate of Insurance (COI):** Wherever applicable, provide a valid insurance certificate for Workman's Compensation, General Liability, Auto Liability, or an Umbrella Liability Policy. Not sure what you need? Contact our Service Provider Advocate today!

○ FILL OUT THE ONLINE FORM

1. Fill out and submit the New Service Provider form on our website with your company information:
www.camsmgt.com/new-service-providers
2. Attach a W9 and necessary COI using the online form.
3. Don't have online access? We can email or send you a copy of the required form.

○ SUCCESSFUL SETUP

1. The CAMS Service Provider Advocate will send you confirmation within 5 business days via email (preferable) or mail once you are properly setup in our system.
2. Your confirmation will include a guide to getting paid, acceptable invoice formats and payment processing information. You will also receive the association codes to put on invoices for the fastest processing.

NEED ADDITIONAL SUPPORT?

Please contact Nichole Coffey, the CAMS Service Provider Advocate directly for assistance.

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