

# Update W-8BEN Tax Forms

This guide demonstrates how to submit updated tax forms in your Jaggaer supplier portal for international individuals and entities.

Signed W-8BEN tax forms are valid for three years. To continue doing business with Indiana University, updated tax forms must be added to the supplier portal as soon as possible. Failure to update this information makes you ineligible to continue working with IU.

The Jaggaer portal is not accessible on mobile devices such as smartphones or tablets.

It must be accessed from a desktop computer.

Select the appropriate profile type below to view instructions for submitting an updated W-8BEN tax form.

### Contents

Instructions for Individuals	2
nstructions for Companies/Entities	6



## Instructions for Individuals

First, <u>login to your Jaggaer supplier portal</u>. Once logged in, click **Indiana University** in the **Customer Portal Access** section.

â		LIER NETWORK			All 🕶	Search (Alt+Q)
<u>е</u> С	Home > Supplier Portal Home Create Invoice / Credit Type	Memo Invoice O Credit Memo	Import Invoice ?	Invoice, picuse enter the invoice number their circle Invoice Number(s) Multiple values of	and Search Butte	Q
\$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	Customer Cus	6/23/2021 m/dd/yyyy Indiana University TEST SITE Dptional PO Number US Dollar	Create ? Customer Contact	Need Assistance?         Help         Search for         Browse the Table of Contents         Training         Online Training and Support         Supplier Contact         Name:       Kathryn Janeway         Title:         Email:       guidinglitedlite@gmail.com         Phone:       +49 351 8564574         JAGGAER Support         Still have questions?       Contact Us C	Q	?
	Indiana University	Complete	Indiana University View All Registrations	Benchmarking To learn more about SmartProcure, click here (	3	?
Q,	Sourcing Events		? View All Events	Contracts No Results		?

On the next screen, click Manage Registration Profile located in the Quick Links section of the page.

	INDUAAA UNIVERSITY     INDUAAUAUNIVERSITY     INDUAAUNIVERSITY     INDUAAUNIVERSITY     INDUAAUNIVERSITY     INDUAAUNIVERSITY     INDUAUNIVERSITY   INDUAUNIVERSITY   INDUAUNIVERSITY   INDUAUNIVERSITY   INDUAUNIVERSITY   INDUAUNIVERSITY   INDUAUNIVERSITY   INDUE    INDUE   I			
Home 🕨 Custom	er Portal Home			
Welcom	iversity Supplier Portal appreciate and look forward to our inued business relationship. questions, please contact us using	Quick Links to Q	Common Tasks	?
	iversity Supplier Portal appreciate and look forward to our inued business relationship. questions, please contact us using Support Form.	Manage Registration	Profile	
continued b	usiness relationship.	Sourcing Events	5	?
		Show	Opening or Closing Soon	Go to Public Opportunities
		No Results		
Custome	er Contact ?	No Results		
Name	Indiana University			View All Events
Title				
Email	5	Contracts		?
Phone	Customer Portal Home	No Results		



Select **Tax Information** from the left-hand navigation.

	<b>U</b> INDIANA UNIVERSITY		€  ≈	<b>4 1</b>
	Registration 🕨 Manage Registratio	n Profile		
<b>1</b> 0	Janeway, Kathryn Supplier Number:u15381243	mber:u15381243 In Complete for: Welcome to iversity TEST SITE Thank you for doi	Welcome to Supplier Registration	?
20	Registration <b>Complete</b> for: Indiana University TEST SITE		Welcome to the Indiana University supplier portal! (TEST) Thank you for doing business with us. Indiana University has made a major investment in redesigning ou	IT DTOCASS
<u>9</u>	Welcome		for procuring goods and services. Our improvements will touch each step from quote, purchase order, de payment. Our implementation of JAGGAER, IU's electronic procurement system, will allow IU to easily so purchase products and services. Our goal is to make it easier to do business with Indiana University.	elivery, and
L	Individual Overview		If you already have an account or are a registered supplier that has been invited to do business with India	ana
5	Addresses		University, please log in with your username and email address.	
	Contacts		Registered suppliers with active log in information will be able to <ul> <li>Maintain valid contact information</li> </ul>	
	Payment Information	× .	<ul> <li>Review the status of payments</li> <li>Update and review banking information</li> </ul>	
	Tax Information	~	rant Registration information:	
			Please ensure that your legal name matches the legal name of the entity as listed on the tax form p	provided to

#### On the Tax Information section page, click **Add Tax Document**, then select **W-8BEN**.

						0 🖻	<b>Å 1</b>
Registration  Manage Registration Profile							
Janeway, Kathryn Supplier Number:u15381243	Tax Information						?
Registration <b>Complete</b> for: Indiana University TEST SITE	Tax Information is used for pa	ayment. Pleas	se download prefilled fo	rm, review for accuracy,	sign and uplo	ad.	
Welcome	Tax Document Name マ	Тах Туре	Tax Document Year	Tax Documentation	e-Signed	Signature Status	
Individual Overview 🗸	k.janeway@gmail.com	W-8BEN	2019	Ł View Document	×	Not Signed	Edit 🗲
Addresses 🗸	Add Tax Document 🔻						
Contacts  Payment Information	W-8BEN						
Tax Information	Tax Form Signature Date *						
	11/27/2019						
Registration FAQ   View History	mm/dd/yyyy						



A new window opens. Enter a name for the tax document in the **Tax Document Name** field. Select the year the W-8BEN was signed from the **Tax Document Year** drop-down menu. **Check the box** next to "Manually upload the document instead."

come		Edit Tax Docu	ment	×	ion	e-Signed	Signature Statu
vidual Overview	~					×	Not Signed
resses	<b>~</b>	Тах Туре 🕇	W-8BEN		+	×	Not Signed
itacts	~	Tax Document Name *	Janeway W-8BEN Updated		L	~	Not signed
ment Information	~	Tax Document Year	2021 🗸				
Information							
ration FAQ   View History			Manually upload the document instead				
		* Required to Complete Registr	ation Save Changes Clo	ose			

New fields appear after checking the box. Visit the <u>IRS website to access a blank W-8BEN tax form</u> or click **Download Pre-populated Tax Document** and Jaggaer generates a W-8BEN form based on your supplier portal information.

#### Important tax form reminders:

- The name listed on the tax form must match the name used to register with the Jaggaer network.
- Tax forms must be signed and dated to be valid. This means the form must be printed, physically signed, then uploaded or signed using an electronic method such as Adobe Sign. Valid electronic signatures must contain the date and time of the signature. The image below is an example of an acceptable electronic signature.

<ul> <li>The person named on line 1 of this form is a resident of the treat the United States and that country, and</li> </ul>	y country listed on line 9 of the form (if any) within the meaning of the income tax treaty between							
For broker transactions or barter exchanges, the beneficial owner	r transactions or barter exchanges, the beneficial owner is an exempt foreign person as defined in the instructions.							
	ling agent that has control, receipt, or custody of the income of which I am the beneficial owner or e income of which I am the beneficial owner. I agree that I will submit a new form within 30 days							
sign Here Sarah Julia Chavez	Digitally signed by Sarah Julia Chavez Date: 2021.06.23 00:17:45 -04'00'							
sign Here Sarah Julia Chavez	Digitally signed by Sarah Julia Chavez Date: 2021.06.23 00:17:45 -04'00' al authorized to sign for beneficial owner) Date (MM-DD-YYYY)							
sign Here Sarah Julia Chavez								



Once your tax form is ready, click **Select file** and upload it to the portal. Click **Save Changes** to save your work.

Registration  Manage Reg	Add Tax Document	×	
Supplier Number:u15381: Registration Complete f Indiana University TEST	Tax Documentation Select file Drop file to attach, or prowse. Done (		y, sign and
Individual Overview	Janeway W-8BEN Updated.pdf 上 100%	d Stat	nature us Signed Edit •
Contacts	I certify this tax document	*	
	* Required to Complete Registration Save Changes	Close	Save Changes

Finally, update the Additional Questions section. Enter the date the W-8BEN was signed in the **Tax Form Signature Date** and update the **Residency Type** field if necessary.

Click **Save Changes** to submit your edits for review by IU's Supplier Data Management (SDM) team. SDM will contact you if they have questions or need additional information.

Welcome		Tax Document Name ♡	Тах Туре	Tax Document Year	Tax Documentation	e-Signed	Signature Status	
Individual Overview	×	Janeway W-8BEN Updated	W-8BEN	2021	Ł View Document	<ul> <li>Image: A second s</li></ul>	e-Signed	Edit 🔻
Addresses	× .	k.janeway@gmail.com	W-8BEN	2019	▲ View Document	×	Not Signed	Edit 🔻
Contacts	× .	Add Tax Document 🗢						
Payment Information	× .							
Tax Information	×	Additional Questions	_					
Registration FAQ   View History		Tax Form Signature Date *     06/23/2021     mm/dd/yyyy						
		Birthdate 05/05/1963 mm/dd/yyyy	0					
		Residency Type <b>*</b>	~	Ð				
							Save Chang	ges



## Instructions for Companies/Entities

First, <u>login to your Jaggaer supplier portal</u>. Once logged in, click **Indiana University** in the **Customer Portal Access** section.

<i>J∧GG∧<del>=R+</del>s</i>	JPPLIER NETWORK		All  Search (Alt+Q)	a 🗢 🍋 🔎
Home  Supplier Portal Home				
Hawthorne Consu	ner Products	?	J∧GG∧ <del>=R</del> •	
JAGGAER Network ID	1001377964			
View Your Company's Net Manage Customer Registr			Find Invoice	?
Send New User Registration	on Request		To check payment status of an invoice or send a n an invoice, please enter the invoice number then o	
Create Invoice / Cr	edit Memo	Import Invoice ?	Invoice Number(s)	۹
A No customers have auth	orized invoice creation this suppl	ier.	Multiple values	s can be separated by a comma(,
Customer Portal A	cress	?	Need Assistance?	1
Customer	Registration Status	Customer Contact	Help Search for	Q
Indiana University	In Progress	Indiana University	Browse the Table of Contents	
		View All Registrations	Training	
			Online Training and Support	

On the next screen, click Manage Registration Profile located in the Quick Links section of the page.

If you do not have access to this part of the supplier portal you will need to request access from another member of your organization. Review the <u>Delegate Portal Access guide</u> for more information.

U INDIANA UNIVERSITY		0 ⊨ 1
Home  Customer Portal Home		
Welcome to the Indiana University Supplier Portal	Quick Links to Common Tasks Manage Registration Profile	?
We appreciate and look forward to our continued business relationship. For questions, please contact us using our <b>Support Form.</b>	Show Opening or Closing Sc	con v Go to Public Opportunities
Customer Contact ?	No Results No Results	
Name Indiana University		View All Events
Title Supplier Data Management Email buyiu.noreply@iu.edu	Contracts	?
Phone +1 812-855-3720	elcome to the Indiana niversity Supplier Portal appreciate and look forward to our tinued business relationship. Quick Links to Common Tasks ?   questions, please contact us using Support Form. Manage Registration Profile ?   stomer Contact ?   ame Indiana University the Management mail ?   mail buyiu.noreply@iu.edu Contracts ?	



Select **Tax Information** from the left-hand navigation.

INDIANA UNIVERSITY		• • •	1
Registration  Manage Registratio	n Profile		
Hawthorne Consume Products	r	Welcome to Supplier Registration	
Registration <b>In Progress</b> for: <i>Indiana University TEST SITE</i> <b>2 of 8</b> Steps Complete		Welcome to the Indiana University Supplier Portal (TEST) Thank you for doing business with us. Indiana University has redesigned our process for procuring goods and services. Our goal is to measier to do business with our University. Our system improvements will touch quotes, purchase orders, deliveries, and payments.	nake
Welcome         If you already have an account or are a registered supplier th username and email address.		If you already have an account or are a registered supplier that has been invited to do business with Indiana University, please log in wit username and email address.	th yo
Company Overview		Registered suppliers with active login information will be able to:	
Business Details	~	<ul> <li>Upload and maintain valid contact, account, and insurance documentation</li> <li>Receive real-time electronic delivery of purchase orders</li> <li>Submit electronic guotes</li> </ul>	
Addresses	<b>~</b>	Quickly and easily submit invoices     Review payment status	
Contacts		Upload and update catalogs	
Insurance		Important Registration Information	
Payment Information	~	Please ensure that your legal name matches the legal name of the entity listed on the tax forms you provide us.	
Tax Information	<ul> <li></li> <li></li> </ul>	t Indiana University Office of Procurement Services via our Support Form, or I	by
Supplier Information	-		

On the Tax Information section page, click **Add Tax Document**, then select the appropriate tax form. The most common form is the **W-8BEN-E**.

							<b>e</b>  •	<b>Å 1</b>
Registration  Manage Registration F	Profile							
Hawthorne Consumer Products		Tax Information						?
Registration <b>In Progress</b> for: Indiana University TEST SITE <b>3 of 8</b> Steps Complete		Tax information is used for p	payment and t	he tax document should	be uploaded using a PDF	format.		
Welcome		Tax Document Name 🗢	Тах Туре	Tax Document Year	Tax Documentation	e-Signed	Signature Status	
Company Overview	~	W-8BEN-E 2019	W-8BEN-E	2019	Ł View Document		e-Signed	Edit 💌
Business Details	~	Add Tax Document 🗢						
Addresses	~	W-8BEN W-8BEN-E						
Contacts	~	W-8ECI						
Insurance	1	W-8EXP	1111					
Payment Information	~	W-8IMY						
Tax Information	×							



A new window opens. Enter a name for the tax document in the Tax Document Name field. Select the year the W-8BEN was signed from the Tax Document Year drop-down menu. Check the box next to "Manually upload the document instead."

TIN Progress TOT: versity TEST SITE		Tux information to used for puji	ment and the tax document should be aproduce	using (		ionnat.	
ps Complete		Add Tax Docu	ment	×	on	e-Signed	Signature Sta
Overview	~	Тах Туре ★	W-8BEN-E		t	*	e-Signed
Details	~	Tax Document Name *	Hawthorne W-8BEN-E Updated				
\$	~	Tax Document Year *	2021 ~				
	~						
	×						
nformation	× .		Manually upload the document instead				
nation	×						
formation	<ul> <li>Image: A second s</li></ul>						
ubmit		* Required to Complete Registra	Save Changes Clo	se			

New fields appear after checking the box. Visit the W-8BEN-E page on the Controller's Office website to access abbreviated versions of the W-8BEN form based on your country and business activity.

Alternatively, click Download Pre-populated Tax Document and Jaggaer generates a W-8BEN form based on your supplier portal information.

#### Important tax form reminders:

- The name listed on the tax form must match the name used to register with the Jaggaer network. .
- Tax forms must be signed and dated to be valid. This means the form must be printed, physically signed, then uploaded or signed using an electronic method such as Adobe Sign. Valid electronic signatures must contain the date and time of the signature. The image below is an example of an acceptable electronic signature.

Part XXX Certification			
Under penalties of perjury, I declare that I have examined the penalties of perjury that:	information on this form and to the best of my knowledge and	l belief it is true, correct, and co	mplete. I further certify under
<ul> <li>The entity identified on line 1 of this form is the benefi purposes, or is a merchant submitting this form for purpos</li> </ul>	icial owner of all the income to which this form relates, is es of section 6050W,	using this form to certify its	status for chapter 4
The entity identified on line 1 of this form is not a U.S. perso	on,		
an income tax treaty, or (c) the partner's share of a partners	connected with the conduct of a trade or business in the Uniter ship's effectively connected income, and owner is an exempt foreign person as defined in the instruction		ed but is not subject to tax under
	holding agent that has control, receipt, or custody of the incon ents of the income of which the entity on line 1 is the beneficia		is the beneficial owner.
I agree that I will submit a new form within 30 days if any cer	tification on this form becomes incorrect.		
Sign Here Contract Co	IRED 🖌	REQUIRED	
Signature of individual auth	orized to sign for beneficial owner	Print Name	Date (MM-DD-YYYY)
I certify that I have the capac	tity to sign for the entity identified on line 1 of this form.		
Note: Lines in this substitute form are numbered to REQUIRE	match the official IRS form. Refer to IRS instruction	ns for Form W-8BEN-E w	hen completing this form.
Jpdate W-8BEN Tax Forms	Page   8	L	ast Updated: 6/25/202



Once your tax form is ready, click **Select file** and upload it to the portal. Click **Save Changes** to save your work.

Registration  Manage Registration Profile Hawthorne Consumer	Add Tax Docu	ment	×	
Products Registration In Progress for: Indiana University TEST SITE 3 of 8 Steps Complete	Tax Documentation *	Select file Drop file to attach, or Done @	ormat.	
Welcome Company Overview		Hawthorne W-8BEN-E Updated.pdf 🛃 100%×	e-Signed	e-Signed Edit
Registration FAQ   View History	* Required to Complete Registra	ation Save Changes	Close	Next > Save Changes

Finally, update the Tax Form Signature Date in the Additional Questions section. Enter the date the W-8BEN was signed in the field.

Click **Save Changes** to submit your edits for review by IU's Supplier Data Management (SDM) team. SDM will contact you if they have questions or need additional information.

Hawthorne Consumer Products Registration In Progress for: Indiana University TEST SITE		Tax Information						?
		Tax information is used for payment and the tax document should be uploaded using a PDF format.						
3 of 8 Steps Complete							et	
Welcome		Tax Document Name ♡	Тах Туре	Tax Document Year	Tax Documentation	e-Signed	Signature Status	
Company Overview	1	Hawthorne W-8BEN-E Updated	W-8BEN-E	2021	🕹 View Document	*	e-Signed	Edit 🔻
Business Details		W-8BEN-E 2019	W-8BEN-E	2019	Ł View Document	~	e-Signed	Edit 💌
Addresses	~	Add Tax Document 🗢						
Contacts	~	Additional Questions						
Insurance	<	Tax Form Signature Date *						
Payment Information	× .	06/23/2021						
Tax Information	<ul> <li>Image: A second s</li></ul>	mm/dd/yyyy						
Supplier Information								
Certify & Submit								
Registration FAQ   View History							Save	Changes