

Supplier Onboarding – International Company

Indiana University (IU) is a member of the Jaggaer supplier network. To receive payment from IU, payees, referred to as "suppliers" in Jaggaer, must complete the supplier onboarding process and join the network. Once established, your supplier portal is used to manage payment information, addresses, tax forms, and more.

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

BUY.IU must be accessed from a desktop computer.

This document provides a step-by-step walkthrough of the supplier onboarding process for a non-US based company.

Before you follow the steps in this document, locate the following items:

- Indiana University supplier invitation email.
- Wire Transfer banking information.
- Scanned image of completed and signed W-8BEN-E or applicable W-8 tax form.

Already started the process and need to pick up where you left off? <u>Click here</u>.

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Invitation

The onboarding process begins when an IU staff member requests your addition to the supplier network. IU Purchasing reviews the request, and, once approved, invites you to begin the onboarding process via email. This email invitation will come from the email address <u>buyiu.noreply@iu.edu</u>, have a sender name of "Indiana University," and will look like the example below.

Click Register Now to establish your username and password.



You will also receive reminder emails from Jaggaer directly. These messages come from support@sciquest.com and contain contact information for Jaggaer's support team.

Please contact the IU department you are working with for assistance first before contacting Jaggaer.



Create Your Jaggaer Network Account

After clicking Register Now in the email invitation, the registration page opens in a browser window. Click the dropdown in the upper right-hand corner to select a language, if desired, then **Continue with Registration** to proceed.

Ф IND	IANA UNIVERSITY	
Registration Checklist	Welcome to Supplier Registration	English 🔻
Registration FAQ	Welcome to the Indiana University supplier portal! (TEST)	<u>English</u>
<u>Registration Tutorial</u>	Thank you for doing business with us. Indiana University has made a major investment in redesigning our process for procuring goods and services. Our improvements will touch each step from quote, purchase order, delivery, and payment. Our implementation of JAGGAER, IU's electronic procurement system, will allow IU to easily source and purchase products and services. Our goal is to make it easier to do business with Indiana University. If you already have an account or are a registered supplier that has been invited to do	 <u>français</u> <u>Deutsch</u> <u>Italiano</u> <u>Espanol</u> 中国
	 business with Indiana University, please log in with your username and email address. Registered suppliers with active log in information will be able to Maintain valid contact information Review the status of payments Update and review banking information Important Registration Information: Please ensure that your legal name matches the legal name of the entity as listed on the tax form provided to 	
	Indiana University's payment terms are NET 30 upon receipt of invoice. We make every effort to pay our suppliers in a timely manner. If you have questions or concerns, contact Indiana University Office of Procurement Services via via our <u>Support Form</u> , or by phone at 812.855.3720.	



Fields marked with a star \star are required. Add your contact info, confirm your email (which will become your Jaggaer username), review and accept the terms and conditions, and complete the Captcha checkbox. Once completed, select **Create Account**.

INDIA	NA UNIVERSITY	
	L. L. Desidentics Tabaia	
Supplier Regis	tration Registration Tutorial	English 🔻
Your Contact Info		
Jean-Luc	Picard	
First Name 🖈	Last Name 🗯	
Tisla		
Title		
855555555	ext.	
Phone Number 🚖		
International phone numbers m	rust begin with +	
EDT/EST - Eastern Stand		
Your Login		
jlpgoiu@proton.me		
Email 🚖		
jlpgoiu@proton.me		
Confirm Email 🗯		
I am a user in need of	accessibility assistance	
Terms and Conditions		
I have read and accept	eted JAGGAER's Terms and Conditions	
I am human	hCaptcha Prinny - lerma	

Your email address acts as your username when accessing the supplier portal. Store your username and password in a safe place! You will need this information to login to the portal and make changes in the future.



After selecting **Create Account**, you will receive a notification that your account was created and that a link has been sent to the email address provided to set up a password.



Locate the password setup message in your email inbox. Select Change supplier account password.



Create a password which meets the required criteria. Select **Set Password**.

Set JAGGAER Global Identity English US Password						
jlpç	joiu@proton.me					
Nev	v Password					
•	•••••	Ø				
Confirm Password						
•	•••••	Ø				
•	•••••	Ø				
•	Minimum of 12 characters	ø				
0		ø				
0 0 0	Minimum of 12 characters	ø				
-	Minimum of 12 characters Must be different from email	Ø				
Ø	Minimum of 12 characters Must be different from email Minimum of 1 special character (not A-Z, a-z, or 0-9)	ø				
0	Minimum of 12 characters Must be different from email Minimum of 1 special character (not A-Z, a-z, or 0-9) Minimum of 1 number	ø				
000000000000000000000000000000000000000	Minimum of 12 characters Must be different from email Minimum of 1 special character (not A-Z, a-z, or 0-9) Minimum of 1 number Minimum of 1 lowercase letters	ø				



Once your password is set, you will be prompted to return to the **original registration link** (sent from <u>buyiu.noreply@iu.edu</u>). Click once more on the **Register Now** button and follow the prompts to log in using the username and password you had created.



Finally, select how to receive your one-time login code. We recommend using the **Send to Email Address on Record** option. Click **Login** to continue.



Locate the one-time code email from Jaggaer to access BUY.IU. Upon login you should automatically be transferred to the BUY.IU supplier portal. **Before continuing**, ensure you see Indiana University branding and a "Welcome to Indiana University" supplier portal banner.

• Logged in but do not see IU branding? <u>Click here</u>.

Complete and Submit Registration Information

The supplier registration page is made up a series of sections, visible in the left-hand menu. Each section is followed by an attention symbol \triangle . Once the section is complete the symbol will be replaced with a green checkmark \checkmark .

1	Back to Internal Supplier Profile Char	ige Registration Type				
6	Le You are editing this profile registration on behalf of: The Sampson Project using Profile 2 - Full - Foreign					
Q	The Sampson Project	Welcome to Supplier Registration				
₩ 血	Registration In Progress for: Indiana University TEST SITE 6 of 8 Steps Complete	Welcome to the Indiana University Supplier Portal (TEST) Thank you for doing business with us. Indians University has redesigned our process for procuring goods and services. Our goal is to make it easier to do business with our				
112	Welcome	University. Our system improvements will touch quotes, purchase orders, deliveries, and payments.				
С С С С С С С С С С С С С С С С С С С	Company Overview Business Details Addresses Contacts Insurance Payment Information Tax Information Supplier Information	If you already have an account or are a registered supplier that has been invited to do business with Indiana University, please log in with your username and email address. Registered suppliers with active login information will be able to: • Upload and maintain valid contact, account, and insurance documentation • Receive real-time electronic delivery of purchase orders • Submit electronic delivery of purchase orders • Outleky and easily submit invoice • Review payment structure • Upload and mainton will be able to: • Review payment structure • Upload and maintoice • Review payment structure • Upload and mainto formation • Review payment structure • Upload and maintoice • Review payment structure • Please ensure that your legal name matches the legal name of the entity listed on the tax forms you provide us. Indiana University's payment terms are NET 30 upon receipt of invoice. We make every effort to pay our suppliers in a timely manner. If you have questions or concerns, contact Indiana University Office of Procurement Services via our Support Form, or by phone at \$12,855,3720.				
	Certify & Submit	Required to Start Registration Legal Company Name* The Sampson Project * Required to Complete Registration Next > Save Changes				

Throughout the registration process you will see fields marked with a star \star .



Welcome

Enter the legal company name in the appropriate field, then click **Next**.

The Sampson Project	t Welcome to Supplier Registration	
Registration In Progress for: Indiana University TEST SITE 6 of 8 Steps Complete	Welcome to the Indiana University Supplier Port	
Welcome	Thank you for doing business with us. Indiana University has redesigned our process for procuring goods and services. Our goal is to make it easier to do business University. Our system improvements will touch quotes, purchase orders, deliveries, and payments.	with o
Company Overview Business Details Addresses Contacts Insurance Payment Information Tax Information Supplier Information	 If you already have an account or are a registered supplier that has been invited to do business with Indiana University, please log in with your username and email a Registered suppliers with active login information will be able to: Upload and maintain valid contact, account, and insurance documentation Receive real-time electronic delivery of purchase orders Submit electronic delivery of purchase orders Quickly and easily submit invoices Review payment status Upload and update catalogs Important Registration Information Please ensure that your legal name matches the legal name of the entity listed on the tax forms you provide us. Indiana University's payment terms are NET 30 upon receipt of invoice. We make every effort to pay our suppliers in a timely manner. If you have questions concerns, contact Indiana University Office of Procurement Services via our Support Form, or by phone at 812.855.3720. 	
Certify & Submit	Required to Start Registration	

You are not required to complete the supplier onboarding process in one sitting. At any time, click **Save Progress** to save your work and return later.



Company Overview

In the Company Overview section, fill in the Country of Origin, DUNS number (if applicable), Legal Structure, US Tax ID Number (if applicable), and Legal Structure (Non-US Based Entity).

E	The Sampson Project	Company Overview ?
16 0	Registration In Progress for: Indiana University TEST SITE 6 of 8 Steps Complete	Watch this video for help: link here 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.
	<u>Welcome</u>	
血	Company Overview 🗸	Please provide all of your DBAs. If you have multiple DBAs, please separate them with semicolons.
继	Business Details	Doing Business As (DBA) 🚭
3 9	Contacts	Country of Origin should be the country you use for tax purposes. (US Citizens and Permanent Residents should select "United States")
հե	Payment Information	Country of Origin * Mexico
A	Tax Information	Does your business O Yes No have a DUNS number?
\$	Supplier Information	
	Certify & Submit	Legal Structure * 😧 Non-US Based Entity 🗸
		If you are registering as an individual please provide your social security number here or equivalent if y u reside outside of the United States.
		Tax ID Number
		Website Ø
		Additional Questions
		Legal Structure Sub-Classification *
		Not Applicable 🗸
		Based on your response to the "Country of Origin" question, you may be eligible for Tax Treaty. To learn more, go to the IU FNIS for Suppliers Site and complete the tax treaty analysis or access or one-page substitute W8BEN-E.
٩		★ Required to Complete Registration Next > Save Changes

- Select 'Non-US Based Entity' from the Legal Structure drop-down menu.
- If you have a US-IRS assigned EIN, enter your company's Employee Identification Number in the Tax ID Number field.

Click **Save Changes** to save your work and **Next** to complete the Individual Overview section. The left-hand menu updates to reflect a green checkmark once the section is complete.

Business Details

This area is comprised of optional information about the company. The only required information is **Commodity Codes**. There may be a Commodity Code already present. If so, click **Next**.

<u>o</u>	The Sampson Project	t	Business Details			?
₩ ≘	Registration In Progress for: Indiana University TEST SITE 6 of 8 Steps Complete		Products and Services			
兆	Welcome Company Overview		Commodity Codes *	Ean PR022 (Marketing Services, Surveys, Market Research, Student Recruitment)	Remove	
39	Business Details	-				
հե	Addresses	-		700 characters remaining		
	Contacts	×				
.	Insurance	~				
8	Payment Information	▲				
*	Tax Information	▲				
	Supplier Information	-				
	Certify & Submit					
			★ Required to Complete Registration		< Previous	Next > Save Changes



Click Edit. A new window will open with a search box.

Commodity Codes	3
Use Search or browse the list to select applicable Commodity Codes. You can select multiple before clicking	Done.
O Selected Codes Showing 1 - 20 of 192 results	
Results Per Page 20 v Sort by: Commodity Code v Arge 1 v	of 10 🕨 ?
Commodity Code Description	

You can search keywords to locate the company commodity area. You can also manually search through the provided list.

Helpful Search Tip: Use simple keywords such as "food," "equipment," or "books."

se search of browse the list	to select applicable Commodity Codes. You can select multiple	e before clicking Done.
research		
Search		
0 Selected Codes		
howing 1 - 5 of 5 results		
Results Per Page 20 🗸	Sort by: Commodity Code 🗸	🔳 Page 1 of 1 📐 📍
Commodity Code	Description	
IT7	Computer (Hardware) - Enterprise & Research & Services	
PR022	Marketing Services, Surveys, Market Research, Student Recruitment	
PRO44	Research agreements, collaboration agreements, and internally funded research agreements	
SCI2	Chemicals, Gases & Elements - Research & Laboratory	
	Research agreements, collaboration agreements,	

Click the commodity code that best describes your business area.

use Search of browse the ha	t to select applicable Commodity Codes. You can select multipl	e before clicking Done.
research		
Search		
1 Selected Codes	1	
Showing 1 - 5 of 5 results		
Results Per Page 20 🗸	Sort by: Commodity Code V	🔳 Page 1 of 1 🕨
Commodity Code	Description	
ΙΤ7	Computer (Hardware) - Enterprise & Research & Services	
PRO22	Marketing Services, Surveys, Market Research, Student Recruitment	
PRO44	Research agreements, collaboration agreements, and internally funded research agreements	
SCI2	Chemicale Gases & Elements - Research & Laboratory	
	Research agreements, collaboration agreements,	

Click **Done** to Continue. Your selection will populate.



Addresses

We require **three** types of addresses: Fulfillment, Physical, and Remittance. They may be all the same or distinct addresses.

The Sampson Projec	t	Addresses	?
Registration In Progress for: Indiana University TEST SITE 4 of 9 Steps Complete		Please enter any addresses from which your organization does business to help us route information and communication correctly. Fulfillment - Where IU will send POs	
Welcome Company Overview Business Details	1	Physical - a physical address, perhaps headquarters, or your Tax Address Remittance - An address associated with where IU will send payment, perhaps the accounts receivable location	
Addresses		Required Information	
Contacts	▲	The following address types are required to complete registration: - Fulfilment	
Diversity	▲	- Physical - Remittance	
Insurance	-	- kemittance	
Payment Information	▲	No addresses have been entered	
Tax Information	▲	Add Address	le Inactive Addresses
Supplier Information	-		
Certify & Submit			
Registration FAQ View History		(Previous	Next >

Click Add Address. A new window will appear.

Add Address	х
Basic Information (Step 1 of 3)	?
What would you like to label this address? *	
Example: Headquarters, Houston Office	
Which of the following business activities take place at this address? (select all that apply) \star	
 Takes Orders (fulfillment) Receives Payment (remittance) Other (physical) 	
* Required to Complete Registration	Next >

Add a title for this address. Check the corresponding boxes for this address.

Click Next

Reminder: fields marked with a star are required. All other fields are optional.



This is where you indicate how you want purchase order distributed: email or fax.

Add Address		
Address Details (Step 2	2 of 3)	
How would you like to receive purchase orders for this fulfillment address? *	Email	×
Email Address *	Email Fax	⊦fd@iu.edu

Add Address		×
Address Details (Step	2 of 3)	?
How would you like to receive purchase orders for this fulfillment address? *	Email 🗸	
Email Address *	johnsoag+fd@iu.edu	
Confirm Email *	johnsoag+fd@iu.edu	
Country *	United States	~
Address Line 1 *	123 Main street	
Address Line 2		
Address Line 3		
City/Town *	Bloomington	
State/Province *	Indiana 🗸	
Postal Code *	47403	
Phone *	8128556101 ext.	
Toll Free Phone	ext. International phone numbers must begin with +	
Fax	International phone numbers must begin with +	
* Required to Complete Registrat	tion	t >



Enter a company contact. If you click **Not Applicable**, you will be required to enter a contact on the next screen.

Primary Contact For 1	This Address (Step 3 of 3)	?
You can also update and a	dd Contacts later from the Contacts page	
 Enter New Contact (Not Applicable	
Select additional contact type(s) to apply	Takes Orders (fulfillment) Receives Payment (remittance) Other (physical) Catalog Corporate Customer Care Sales Technical P O Failure	
Contact Label *	Administrative	
First Name *	Jerry	
Last Name *	Taylor	
Position Title		
Email *	johnsoag+sp@iu.edu	
Phone *	8128556101 ext. International phone numbers must begin with	th +
Toll Free Phone	ext.	th +
Fax	International phone numbers must begin wi	

Click Save Changes. If you added a remittance contact, both the Addresses and Contacts section are now complete.

The Sampson Project		Addresses			?
Registration In Progress for: Indiana University TEST SITE 6 of 8 Steps Complete		Please enter any addres Fulfillment - Where IU wi		to help us route information and communication correct	у.
Welcome		Physical - a physical add	dress, perhaps headquarters, or your Tax Address	5	
Company Overview	-	Remittance - An address	s associated with where IU will send payment, pe	rhaps the accounts receivable location	
Business Details	-				
Addresses	~	Address Label	Address Types	Address	
Contacts	1	Business	Remittance (Primary)	123 Main street	Edit 💌
Insurance	~		Fulfillment (Primary) Physical/Tax (Primary)	Bloomington, Colima, 47403 Mexico	
Payment Information	▲	Add Address			Show Inactive Addresses
Tax Information	▲	Auti Autiess			
Supplier Information	-				
Certify & Submit					
					Previous Next >

Click Next



Contacts

Contacts receive notifications related to orders established with IU. You are required to have one "Remittance" contact on file to satisfy this section of the registration process.

If you added a remittance contact during the **Address** section, **Contacts** will be completed.

Click Add Contact

Kirk, James		Contacts			
Registration In Progress for: Indiana University		Contact Label	Name	Email	
3 of 5 Steps Complete					
Welcome		Add Contact			
Individual Overview	×	Add Contact			
Addresses	1				
Contacts	~	-			
Payment Information	1				
Tax Information	1				
Certify & Submit					
Registration FAQ View History					
					< Previous

Enter contact information relevant to the company.

Reminder: fields marked with a star are required. All other fields are optional.

Click **Save Changes** to save the contact to your profile.

Edit Con	tact		
Contact Label *	Self		
First Name *	James		
Last Name *	Kirk		
Position Title			
Email *	cptkirk@gmail.com		
Phone *	+1 812-856-4574	ext.	
	International phone number	ers must begin	with +
Toll Free Phone		ext.	
	International phone numbe	ers must begin	with +
Fax		ext.	
	International phone number	ers must begin	with +
Primary	Yes No		
* Required to Comp	lete Registration	ave Changes	cl



Repeat these steps as many times as desired to add additional contacts to your profile.

Click **Next** to continue to the Payment Information section.

The Sampson Project		Contacts				?
Registration In Progress for: Indiana University TEST SITE 6 of 9 Steps Complete		Please enter contact info always contacting the co	ormation for any individuals at your organiz prrect individual. Contacts can be linked to	ation who may provide valuable one existing address. Any requir	information or help to our company. ed contact types are listed below.	This will help us ensure we are
Welcome Company Overview		Contact Label	Contact Types	Name	Email	
Business Details	-	Administrative	Fulfillment (Primary) Remittance (Primary) Other (Primary)	Taylor, Jerry	johnsoag+sp@iu.edu	Edit
Addresses	1	Add Contact 👻				Show Inactive Contacts
Contacts	1					
Diversity	A					
Insurance	-					
Payment Information	▲					
Tax Information	▲					
Supplier Information	-					
Certify & Submit						
Registration FAQ View History						Previous Next >

Insurance

Certain services may require liability insurance. Check with your IU customer if you are unsure.

If insurance is needed, click **Add Insurance** and upload supporting documents. If insurance is not required, click **Next.**

INSURANCE CARRIERS All insurance carriers selected by supplier must be rated "A-" or above in the most recent edition of the "A.M. Best's K Important: Do not combine critical data documents such as SSN or Bank Information with an uploaded Insurance Certifica		
Refer to Indiana University's page on how to properly redact information from documents before uploading - https://kb.iu	.edu/d/adgl	
No Insurance has been entered.		
	<pre></pre>	Next >



Payment Information

Non-US companies may only be paid via wire transfer. Click Add Payment Information and select Wire Transfer.

The Sampson Projec	rt	Payment Information	?
Registration In Progress for: Indiana University TEST SITE 7 of 9 Steps Complete		IMPORTANT: Currency on all invoices must match the currency stated on Indiana University issued purchase orders.	
Welcome		Information on this page is used to determine how and where you will receive payment. Please enter an email address if you wish to receive an email notification regarding payments including invoice, date, and amount.	
Company Overview Business Details Addresses Contacts Diversity Insurance	*****	The order of prioritization of payment methods is: • US Bank Payment Plus – Single Use Credit Card • Sign up at US Bank is required to properly receive payment. Option will not be activated until setup is complete. Contact iu@supplier-services.com. • Direct Deposit (ACH) • U sends ACH payments only in CCD format in USD. • U only sends ACH payments to US-based bank accounts. • Wire Transfer • Limited to foreign transactions only. US based suppliers will be asked to submit direct deposit details if only wire transfer information is provided. • Method is approved before wire transfer will be sent. • Check • Payment is made to the remittance address on file. Please keep this information up to date.	
Payment Information	A	If no payment method is selected the default payment method is a check to the remittance address on file.	
Tax Information Supplier Information Certify & Submit	▲ ✓	If you have a Sub-Award Contract with Indiana University requiring payment in US Dollars, set USD (United States Dollar) as the preferred currency for payments. Please note that Indiana University's preference for payment terms is NET 30 upon receipt of invoice because this is the shortest period in which we can consistently ensure payment. The University makes every effort to uphold our commitment to pay our vendors in a timely manner. If you have questions or concerns, contact Indiana University Office of Procurement Services via our <u>Support Form</u> , or by phone at 812,855.3720.	3
Registration FAQ View History		Required Information At least one payment type is required to complete this section. No payment information has been entered. Add Payment Information (Previous)	xt >

You may enter multiple payment methods but may only have one active payment method.

Payment via Wire Transfer

Select **Wire Transfer** from the drop-down menu. A new window opens where you can enter your banking information. You may select Check if your company has a US mailing address, or Direct Deposit (ACH) if your company has a US banking account. **Most international suppliers should select Wire Transfer**





If you wish to receive an email notification when payment is issued via this method, enter your email address in the **Electronic Remittance Email** field. Preferred Currency is also selected here.

Invoices received must match the currency chosen during registration.

Add Payment Information			
Only associated countries	are displayed.		
Payment Title *	Wire		
Country *	Mexico	~	
Payment Type *	Wire Transfer		
Remittance Address	Business (Primary Remittance) 🗸		
Electronic Remittance Email	AR@SP.me		
Currency *	MXN 🗸		

Next, enter your bank account information in the **Bank Account** section.

Click Save Changes to save your work.

Bank Account		
Country *	Mexico	~
Bank Name *	Bank ofMexico	
Account Holder's Name *	Sampson Project	
Account Type *	Checking 🗸	
Account Number Type \star	Account Number 🖌	
SWIFT/BIC *	SWIFTXXX	
International Routing Code (IRC)		
Account Number *	XXXXXXXXXXXXX	
Confirm Account Number \star	XXXXXXXXXXXXX	



Next, complete required fields under Additional Questions.

Vire Transfer Currency		
MXN - Mexican Peso 🗸		
lease confirm the Payment Method you have selected: *		
 Check (Paper check sent to selected remit address) 		
ACH Wire Transfer		
IU INTERNAL ONLY - DO NOT USE		

Once payment information is entered, click **Save Changes**.

At the bottom of the **Payment Information** section, upload supporting bank document(s) that verify the wire details.

Click Select File under 'Wire Attachment Upload'. An additional, optional field for intermediary bank information is

also present.

For Wire Payments, IU requires an uploaded attachment, preferably on bank or company letterhead. The attachment should include the following:				
 Swift Code Account Holder's Name Bank name Account number IBAN (if applicable) Sort code (if applicable) Intermediary Bank information (if applicable) 				
Wire Attachment Upload *				
Select file Drop file to attach, or browse.				
Intermediary Bank Upload (<mark>if applicable</mark>)				
Select file Drop file to attach, or browse.				

After selecting and uploading your bank information document, Click Save Changes.

A document verifying bank information is <u>REQUIRED</u>. If this is missing, your registration will be returned, and payment delayed.



Tax Information

A completed and signed W-8BEN-E (or W-8 iteration) tax form is required to complete registration. Click Add Tax Document and select the appropriate W-8BEN tax form.

*If you do not see the option to add a tax document, ensure "Non-US Based Entity" is selected as legal classification on the Company Overview section.

The Sampson Project	Tax Information
Registration In Progress for: Indiana University TEST SITE 7 of 8 Steps Complete	Tax information is used for payment and the tax document should be uploaded using a PDF format.
Welcome	
Company Overview	Required information At least one tax document is required to complete this section.
Business Details	✓
Addresses	No tax information has been entered
Contacts	Add Tax Document 🗸
Insurance	W-SBEN W-SBEN-E
Payment Information	Wobline w may upload a shortened one-page version of the W-8BEN-E form instead of the eight page form. You may access w-8ECI using our tax treaty application. You can find a blank one page form here.
Tax Information	W-8EXP part of our registration process.
Supplier Information	W-SIMY
Certify & Submit	08/24/2022 III mm/dd/yyyy

Enter a name for the tax form in the **Tax Document Name** field and select the year the form was signed from the **Tax Document Year** drop-down menu.

If you already have a completed tax document on hand *with a REV. date of 2021 or newer*, click Select file to upload the document.

Add Tax Document ×		
Тах Туре *	W-8BEN-E	
Tax Document Name *	Sampson Project	
Tax Document Year *	2022 🗸	
Tax Documentation *	Select file Drop file to attach, or browse.	
	L Download Pre-populated Tax Document	
* Required to Complete Regist	ration Save Changes Close]



If you do not have a completed W-8 form saved to your computer, click **Download Pre-populated Tax Document**. Jaggaer generates a W-8 tax form which contains information previously entered during the registration process.

You must print and sign the pre-populated document, then upload.

Add Tax Document *		
Тах Туре *	W-9	
Tax Document Name *	Sampson Project	
Tax Document Year	2021 🗸	
Tax Documentation *	Select file Drop file to attach, or browse.	
	Lownload Pre-populated Tax Document	
* Required to Complete Registration Save Changes Close		

Print the tax form, sign and date, and scan the document. The signed document can then be uploaded by clicking **Select** file.

The tax form MUST be signed to satisfy this requirement. Please double check and verify the form is signed and complete prior to uploading.

Once uploaded, click **Save Changes** to upload the document to your profile.



Enter the date the form was signed in the **Tax Form Signature Date** field. You may also select the date using the calendar widget to the right of the field. Select a **Chapter 3 Status Code**.

• W-8BEN-E tax forms are valid for 3 years from the **Signature Date.**

Click Save Changes to save your progress and Next or Proceed to Certify and Submit to continue.

The Sampson Project	Tax Information				
Registration In Progress for: Indiana University TEST SITE 7 of 8 Steps Complete	Tax information is used for payment	and the tax document should	be uploaded using a PDF format.		
Welcome	Tax Document Name 🗢	Тах Туре	Tax Document Year	Tax Documentation	
Company Overview Business Details	✓ Sampson Project	W-8BEN-E	2022	Ł View Document	Edit 💌
Addresses	Add Tax Document 👻				
Contacts	 Additional Questions As a paper US based aptity you may 	upload a chartoned one par	o version of the W SPEN E form i	instead of the eight page form. You may	accord a partially
Insurance	 As a non-os based entity, you may completed shortened form using o 				access a partially
Payment Information	 Download and upload it as part of 	our registration process.			
Tax Information	A Tax Form Signature Date *				
Supplier Information	✓ 08/24/2022				
Certify & Submit	mm/dd/yyyy				
	LOB Code (W8BEN-E Part III 14 b. Cl	aim of Tax Treaty Benefits)			
		v 9			
	Chapter 3 Status Code *		٦		
		~			
	Chapter 4 Status Code				
		~			
				(Previous	Next > Save Changes

Supplier Information

This section is optional for Shipping Terms

The Sampson Project	Supplier Information	
Registration In Progress for: Indiana University TEST SITE	Watch help video here: link here	
9 of 9 Steps Complete		
Welcome	Shipping Payment Terms	
Company Overview	✓ IU Pays, Part of PO ("Prepaid and Add") ✓	
Business Details	J	
Addresses	Si ⁺ IU Pays, Part of PO ("Prepaid and Add") IU Pays, Separate Bill ("Collect")	
Contacts	Vendor Pays ("Allowed")	
Diversity	Paid by 3rd Party	
Insurance		
Payment Information	1	
Tax Information	✓	
Supplier Information	1	
Certify & Submit		
egistration FAQ View History	★ Required to Complete Registration	Next > Proceed to Certify and Submit >

Click Proceed to Certify and Submit



Certify & Submit

Finally, verify your name, title, and email address in the appropriate fields. Prior to submission, you can review or update a section by selecting it from the left-hand menu.

The Sampson Project	Certify & Submit	?
Registration In Progress for: Indiana University TEST SITE 9 of 9 Steps Complete Welcome	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.	
Company Overview Business Details Addresses Contacts Diversity Insurance Payment Information	Preparer's Initials * A C Preparer's Name * Amanda Coats Preparer's Title * CFO Preparer's Email Address * johnsoag+SP@iu.edu Today's Date 8/24/2022 Certification * V I certify that all information provided is true and accurate.	
Tax Information Supplier Information Certify & Submit Registration FAQ View History	★ Required to Complete Registration	

Once you are satisfied that the information you have entered is correct, check the box next to Certification and click Submit.

After submission, you will see a confirmation screen like the one below.

	Registration > Manage Registration Profile	
<u>io</u>	3 JAGGAER revised its Service Privacy Policy effective May 25, 2018. By closing this banner, you acknowledge that when you use our Solution, we process your personal information as described in our Service Privacy F	olicy.
Q	Thank You for Registering ?	
3 9	Registration Complete for The Sampson Project!	
Juli,	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 	
e ب		



Additionally, you will receive an email confirming your submission.

applier Registratio	on Complete for Indiana University
IU Indiana U	<buyiu.noreply@iu.edu></buyiu.noreply@iu.edu>
) If there are problems with h	ow this message is displayed, click here to view it in a web browser.
	Supplier Registration Complete for Indiana University
	Dear The Sampson Project,
	Thank you for completing your Jaggaer registration profile. Your information has been submitted to Indiana University TEST SITE and is awaiting review. The IU Supplier Workgroup will contact you with any questions they may have. As a reminder, you can log into your secure account by visiting Indiana University TEST SITE's Customer Portal Login Link
	In the meantime, we encourage you to review our <u>For Suppliers page</u> for additional information regarding the features of your new portal, including invoice submission and payment tracking. You may login to your portal at any time by visiting the <u>Jaggaer</u> <u>Customer Portal page</u> .
	Please contact the IU Supplier Workgroup with any questions by emailing or calling (812) 855-3720, option 1.
	Thank You,
	Indiana University



Registration Approval

IU Procurement will review your information and contact you if any additional information is needed. Communication will be sent via email from buyiu.noreply@iu.edu or helpmeiu@iu.edu

Once your registration is approved, you will receive a confirmation email like the one below. This message will come from support@sciquest.com. This confirmation notice may take up to 48 hours to be delivered.

Welcome to the JAGGAER Supplier Network	Inbox ×	Ð
SciQuest Support UserTest <support@sciquest.com> to me *</support@sciquest.com>	Nov 26, 2019, 11:01 AM 🔮 🔦	:
JAGGAĦ	SUPPLIER NETWORK	
Dear		
Congratulations! is now a member of the JAGGA market-leading network of 150,000+ active unique suppliers. As a r able to:	ER Supplier Network, which is a nember of the network you will be	
 Store basic company information in your profile and share on-boarding process. Manage communications with all JAGGAER customers the JAGGAER Supplier Network. Deduce invoice processing time and expense through electronic statements. 	arough the no fee, self-service	
 Reduce invoice processing time and expense through ele the ability to check invoice status when working with JAG customers. Choose between punch-out and hosted catalogs for prod 	GAER Accounts Payable Director	
 content and pricing from one central location. Increase your visibility to JAGGAER customers searching purchasing needs. 	for suppliers to fulfill their	
Within your private JAGGAER Network Portal (Network supplier we basic information about your company, invite colleagues to become order to begin taking advantage of the benefits listed above, you w Profile, which stores information about your company. It is important possible in your Network Profile to ensure buyers can connect with	e users of your site, and more. In ill first need to complete your Network nt to complete as much information as	
As a reminder, you can log into your secure account by visiting the bookmark this page in your internet browser for future access. For visit the Online Training and Support located on the JAGGAER Net	information about using the portal,	
JAGGAER Supplier Network Login Page		
Your login information is located below.		
Company:		
Email: <u>cptkirk@gmail.com</u>		
If you have any technical questions, please feel free to contact our 1.800.233.1121 Option #3 and identify yourself as registering in the		
Thank You,		
JAGGAER Support		

Congratulations! You are now a member of the Jaggaer supplier network and may receive payments from IU.



Continue Registration

Access your supplier registration by <u>logging into the Jaggaer supplier portal</u>. Once logged in, click **Indiana University** in the Customer Portal Access section.

n Home		
orders	🎢 Home > Supplier Portal Home 🔻 > JAGGAER Supplier Network Home	
Catalogs and Contracts	3 JAGGAER revised its <u>Service Privacy Policy</u> effective May 25, 2018. By closing this banner, you information as described in our Service Privacy Policy.	u acknowledge that when you use our Solution, we process your personal $igstar{\mathbf{x}}$
Suppliers	James Kirk ?	J∧GG∧ =R ⊷
🙀 Sourcing	JAGGAER Network ID 1001602284 View Your Company's Network Profile	
IL. Reporting	Manage Customer Registrations Send New User Registration Request	Find Invoice ? Advanced Search
🗶 Tools		To check payment status of an invoice or send a message to a customer regarding an invoice, please enter the invoice number then click the "Search" button.
IOOIS	Create Invoice / Credit Memo Import Invoice ?	Invoice Number(s) Q
🔐 Administer	A No customers have authorized invoice creation for this supplier.	Multiple values can be separated by a comma(,).
🗴 Setup	Customer Portal Access ?	Need Assistance? ?
	Customer Registration Status Customer Contact	Help Search for Q
	Indiana University Complete Indiana University	Browse the Table of Contents
	View All Registrations	Training

If it is the first time you are accessing your portal after your initial login, a pop-up window will appear notifying you that you are leaving the Jaggaer portal and continuing to the Indiana University portal.

Check the box 'Don't show me this again' and click OK to dismiss the message and continue.





In the IU portal, click Manage Registration Profile to continue completing the registration process.

		SITY			
í.	Home Customer		tivo Mou	r 25, 2018. By closing this banner, you acknowledge that when you use our Solut	ion we procees your personal information as described in our
9 39	Welcome to the Indiana University Supplier Portal We appreciate and look forward to our continued business relationship. For questions, please contact us using our Support Form.			Quick Links to Common Tasks Manage Registration Profile	
Щ. Ш				Sourcing Events	?
m. ⇔	Customer Contact ?			Show Opening or Closing Soon v No Results No Results	Ge Go to Public Opportunities
	Name Title Email	Indiana University Supplier Data Management buyiu.noreply@iu.edu			View All Events
		+1 812-855-3720		Contracts	?

Select a section from the left-hand menu to continue registering. Sections marked with a green checkmark are complete. Gray checkmarks represent sections which require additional information.

*	1 INDIANA UNIVERSITY								
	Registration > Manage Registration Profile JAGGAER revised its Service Privacy Policy effective May 25, 2018. By closing this banner, you acknowledge that when you use our Solution, we process your personal information as described in our Service Privacy								
i.									
<u>Q</u>	The Sampson Project		Welcome to Supplier Registration						
3 9	Registration Complete for: Indiana University TEST SITE		Welcome to the Indiana University Supplier Portal (TEST)						
հե	Welcome		Thank you for doing business with us. Indiana University has redesigned our process for procuring goods and services. Our goal is to make it easier to do business with our University. Our system improvements will touch quotes, purchase orders, deliveries, and payments.						
	Company Overview	-	If you already have an account or are a registered supplier that has been invited to do business with Indiana University, please log in with your username and email address.						
a 7	Business Details	-	Registered suppliers with active login information will be able to:						
æ	Addresses		Upload and maintain valid contact, account, and insurance documentation Receive real-time electronic delivery of purchase orders						
~	Contacts	-	Submit electronic quotes Quickly and easily submit invoices						
	Diversity	1	Review payment status 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	~	Indiana University's payment terms are NET 30 upon receipt of invoice. We make every effort to pay our suppliers in a timely manner. If you have questions or concerns, contact Indiana University Office of Procurement Services via our Support Form, or by phone at 812.855.3720.						
	Supplier Information	× .							
	Registration FAQ View History								