

May 29, 2015

W-9 Process Change

For the past few months, we've been talking about W-9 business process changes. These changes are associated with the new functionality in CU Marketplace that we introduced last fall: the CU Supplier Portal.

Initially, only certain suppliers used the portal to register their W-9 information with the University. As of May 1, 2015, all new suppliers register through the portal. Note, however, the following exceptions:

Study subjects. The study subject's paper [W-9 \(IRS form\)](#) must accompany the Study Subject Payment (SSP) form to ensure that the individual is correctly set up under the Clinical Trial supplier record.

Reimbursements/refunds. Tax documents are not needed in order to issue reimbursements using the Non-Employee Reimbursement (NR) form ... or process refunds using the Payment Authorization (PA) form. Therefore, recipients of reimbursements or refunds do not need to register through the Supplier Portal ... or submit W-9 forms.

CU employees and CU students are not considered suppliers and do not need to complete the supplier registration process or submit W-9 forms.

Benefits of the CU Supplier Portal

In addition to replacing the paper W-9/W-8 process, the portal allows suppliers to:

- Register online to become a supplier with CU.
- Manage supplier information, such as addresses, contacts, and diversity classification
- View and respond to University solicitations on the CU Sourcing website.
- View invoice status online.

Definition of "Supplier"

A "supplier" is defined as any external entity or individual paid by CU for goods or services. (See also the Note, above.)

CU Students: CU Marketplace vs. PA Form

Occasionally, departments need to make payments to CU students in the Marketplace. If the student is not already in CU Marketplace, the department should email his or her name and student ID number (not Social Security Number) to PSC-Vendoring@cu.edu and request that the student be set up in the Marketplace.

If the department needs to pay a CU student using the PA form, the department should include the student ID number (not Social Security Number) on the PA form.

Got Questions?

In this newsletter, you'll find some Frequently Asked Questions (FAQs) from the FinPro Help Desk and the April PSC Town Halls. Plus, we've posted [many more FAQs](#) on our website.

If you're ever stuck on a Marketplace screen, look for a ? icon. Click it to get info.

Contact the FinPro Help Desk. Just call 303.837.2161 or email FinProHelp@cu.edu.

How do I search for a supplier in Marketplace?

Once in CU Marketplace, navigate to **Supplier Management** > **Manage Suppliers** > **Search for a Supplier** and enter the supplier's name.

Not there? Invite the supplier to register in the CU Supplier Portal.



How do I invite a supplier to register?

Use the Marketplace!

Important! You need to send an invitation. Do not tell the supplier to just go to the portal and register!

In Marketplace click the icon  and go to **Manage Suppliers** -> **Add Supplier**.

Identify the registration type. (Select Individual if the supplier is an individual who will be paid on the Payment Voucher. Select Purchase Order for all other suppliers. If in doubt, pick Purchase Order.)

At minimum, enter the supplier name and email address (Tax identification number is great, if you know it!)

Click [Invite Supplier to Register](#)

CU Marketplace will send an email, asking the supplier to complete registration and provide tax documents online.

How do I know that my supplier has responded to my invitation?

When the supplier has completed registration and been approved by the PSC, you will receive an automated email from PSC-Vendoring.

What if the portal thinks it has a match?

The CU Supplier Portal looks for matches in any one of several fields, including tax identification number, name, and email address. If the portal thinks it has found a match, it will not let you go forward. If you disagree (you don't think the supplier you want is there), please email CUSupplier@cu.edu.

My supplier says they registered – so why can't I find them?

Begin by looking up the supplier (see supplier search question, above). Then, check the supplier's Registration Status:

Invited - The supplier has been invited but hasn't taken any action yet.

In Progress - The supplier has started to fill out the registration profile but hasn't submitted it to the PSC yet.

Profile Complete - The supplier has completed and certified the registration profile and submitted it to the PSC.

Approved - The PSC has approved the supplier's information and the supplier is now available in the CU Marketplace.