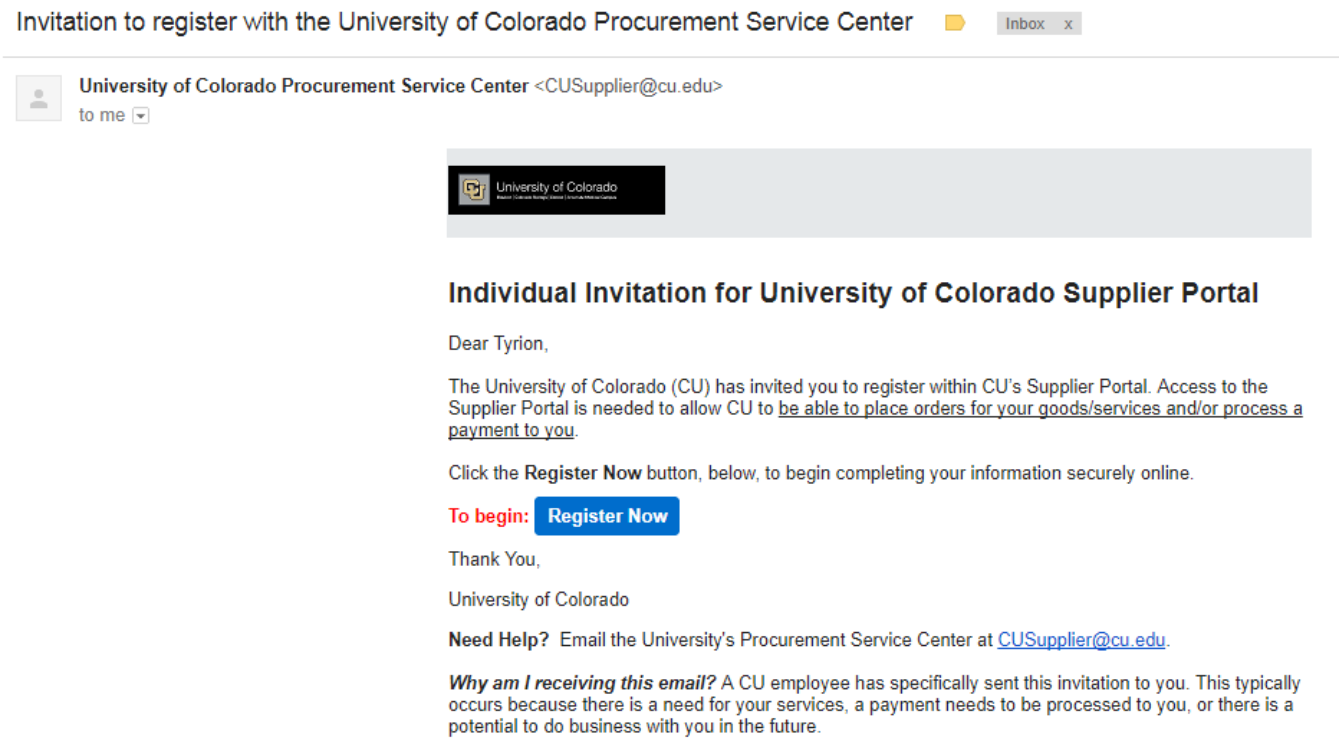
Supplier Portal Registration Guide: Individual

Below are instructions for completing your registration with the University of Colorado's (CU) Supplier Portal.

When a CU department invites you to register for the supplier portal, you will receive the following email from CUSupplier@cu.edu:



Invitation to register with the University of Colorado Procurement Service Center Inbox x

University of Colorado Procurement Service Center <CUSupplier@cu.edu>
to me

University of Colorado

Individual Invitation for University of Colorado Supplier Portal

Dear Tyrion,

The University of Colorado (CU) has invited you to register within CU's Supplier Portal. Access to the Supplier Portal is needed to allow CU to be able to place orders for your goods/services and/or process a payment to you.

Click the **Register Now** button, below, to begin completing your information securely online.

To begin: **Register Now**

Thank You,

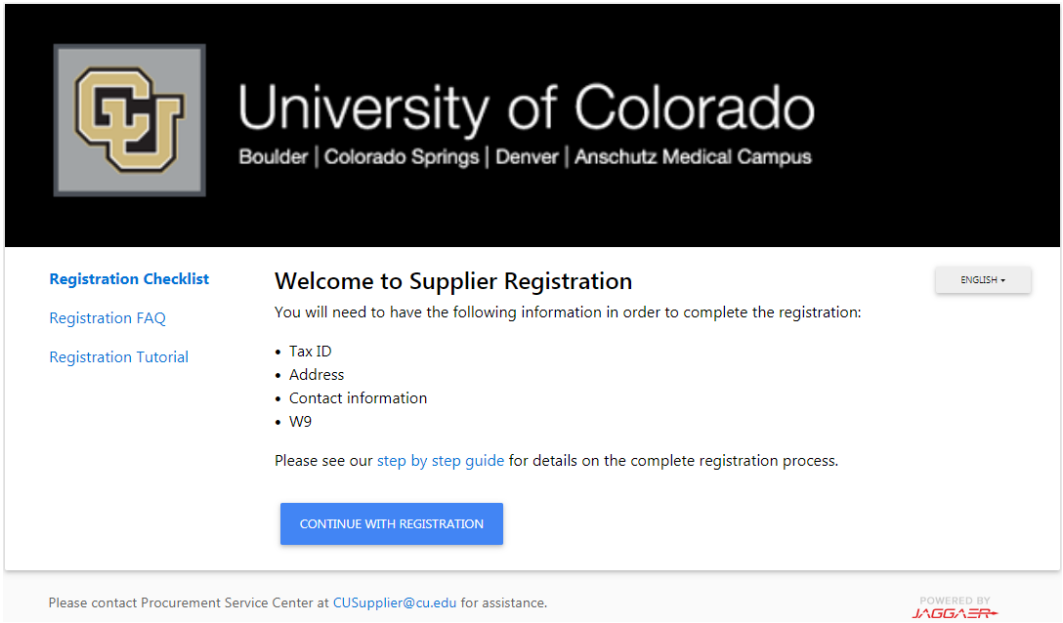
University of Colorado

Need Help? Email the University's Procurement Service Center at CUSupplier@cu.edu.

Why am I receiving this email? A CU employee has specifically sent this invitation to you. This typically occurs because there is a need for your services, a payment needs to be processed to you, or there is a potential to do business with you in the future.

You must use the **Register Now** link contained in the email to access your profile. If you do not receive the link, please contact CUSupplier@cu.edu. If you start your registration, but need to come back to it at a later date, you can access your profile at www.cu.edu/psc/supplierlogin

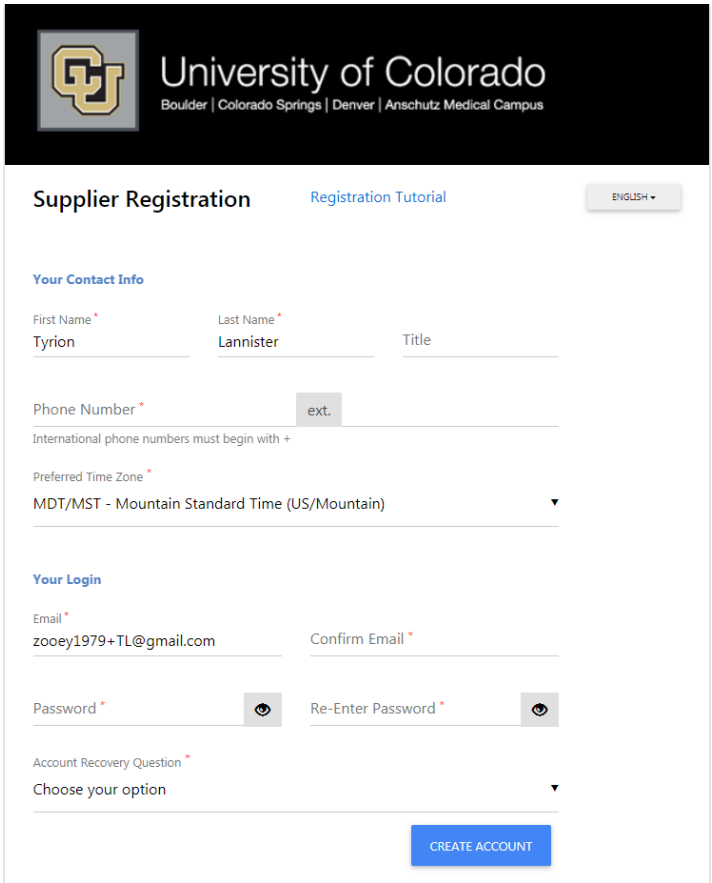
Once you click the **Register Now** link from the email, you will be brought to the welcome page for the supplier registration.



Please click CONTINUE WITH REGISTRATION

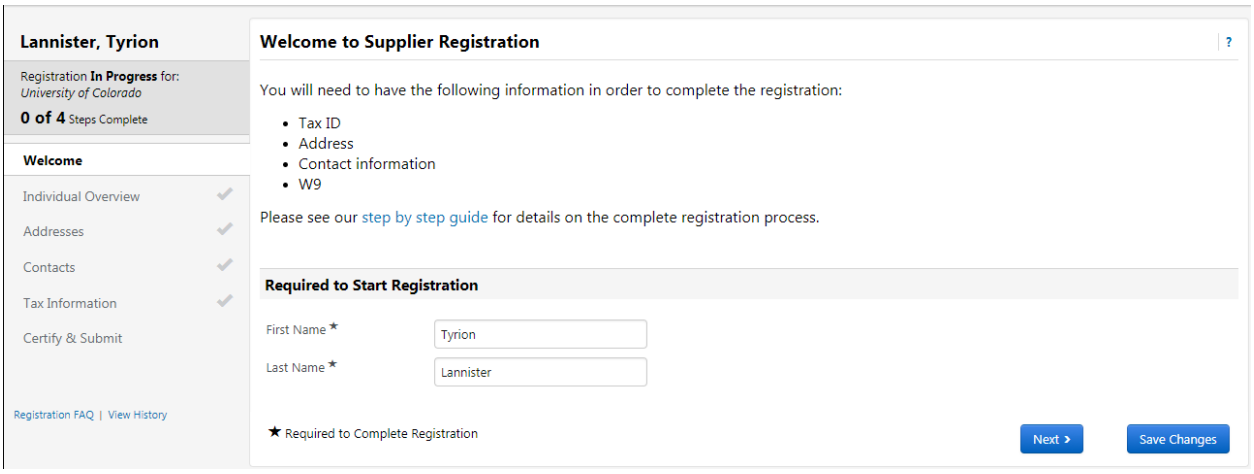
You will then be taken to a page where you can create your account and set up your login information. This is also where you will create your portal password, which will be used for e-signing your tax document at the end of the registration.

Complete all fields that have the star symbol next to them and click CREATE ACCOUNT



Welcome

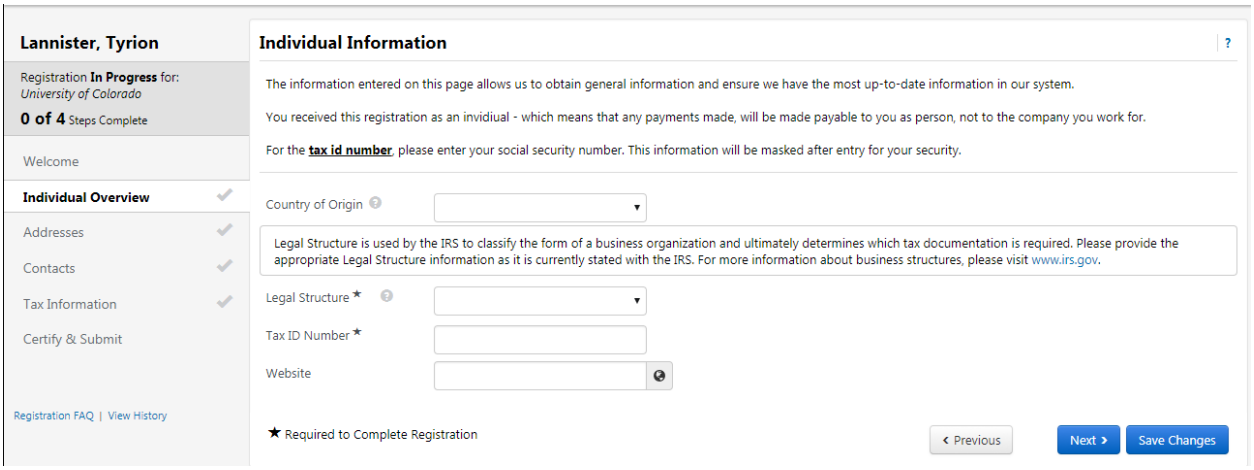
Verify your legal name. This is the name that will be entered on all Purchase Orders and Payments. If your legal name is different from the one you were invited under, this is where you would correct it.



Verify the information and click

Individual Information

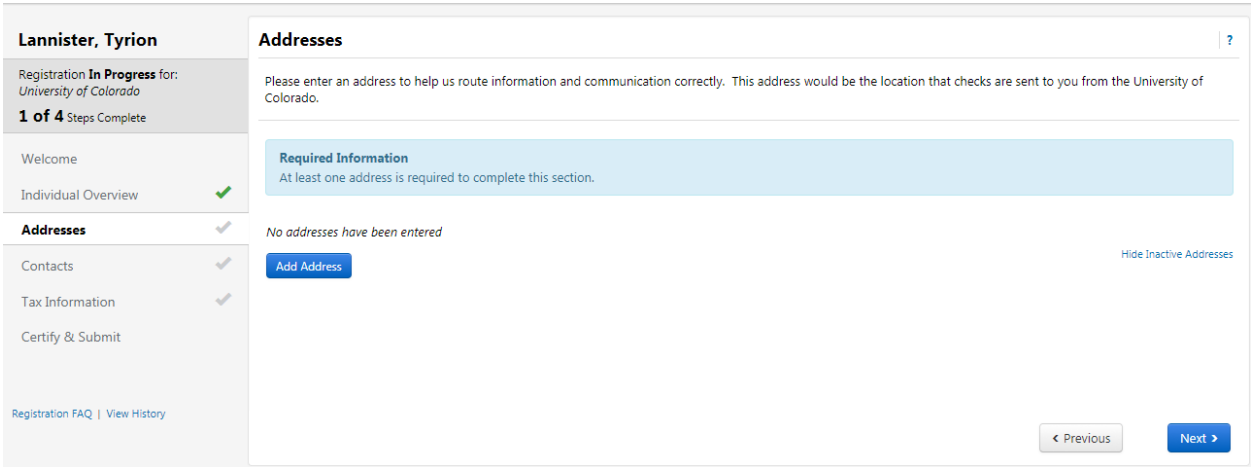
This is the page where you will provide your tax information. **If you are an international supplier, please choose Foreign Individual from the Legal Structure menu. The tax ID number field will then become optional.**



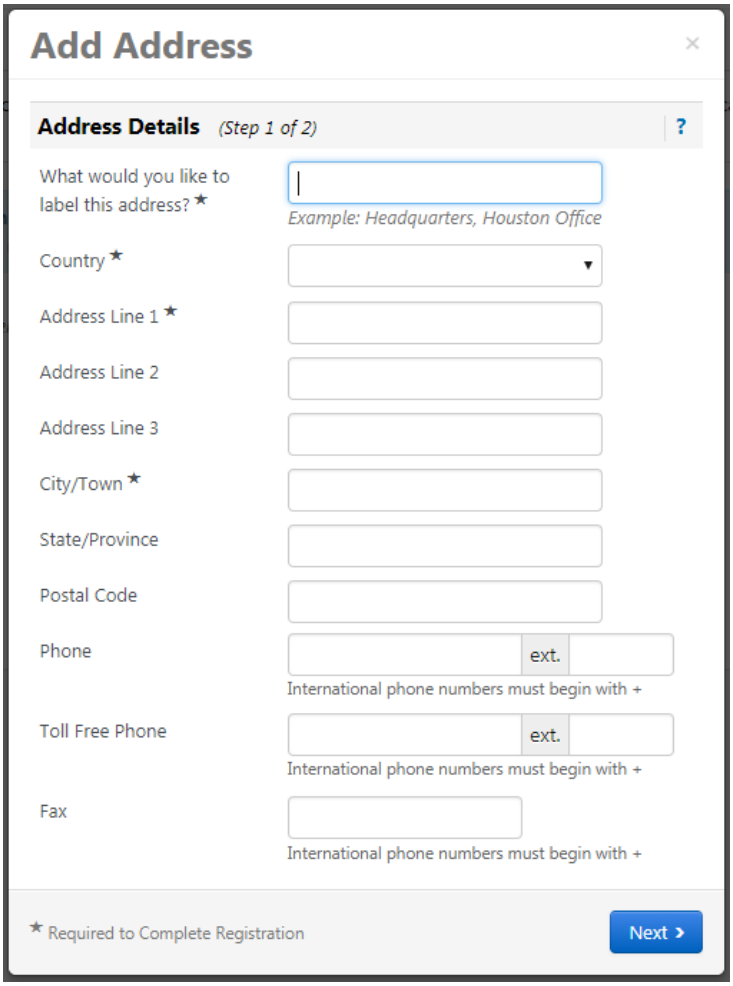
When you have completed the information on this page, click

Addresses

You will need to enter at least one address in order to proceed.



Click on the Add Address button.

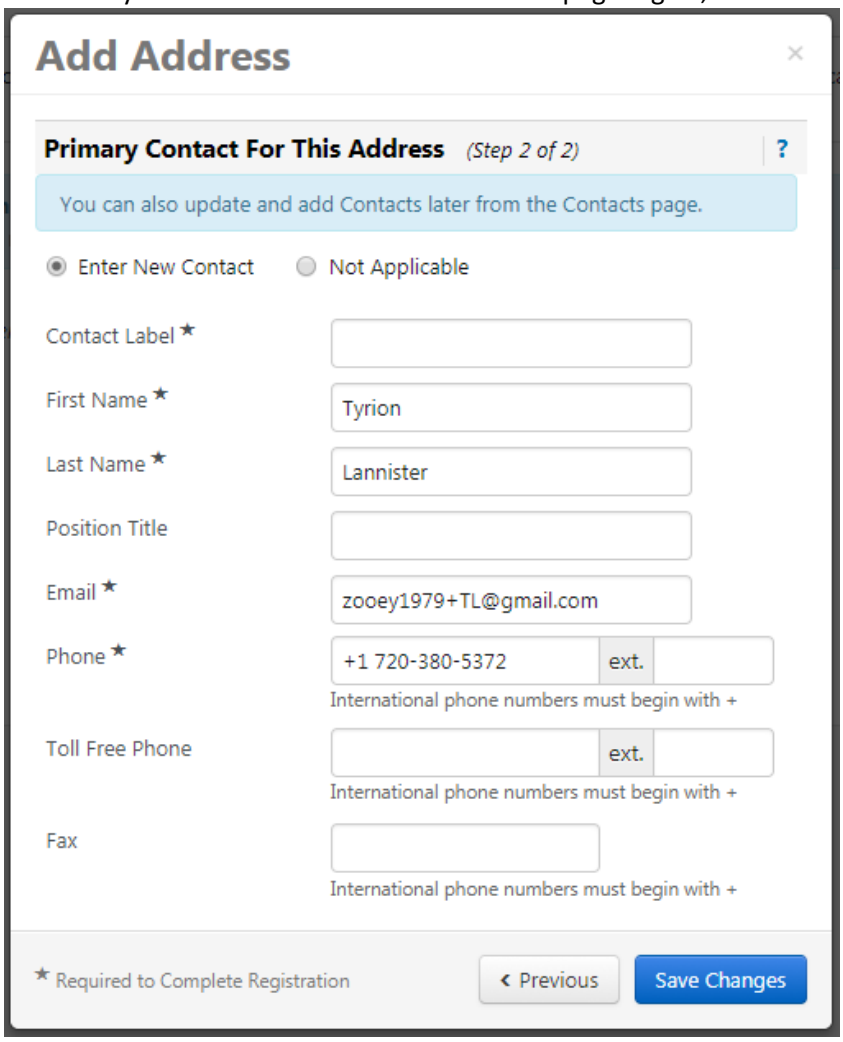


You can enter anything for the address label. Provide the required information and click Next

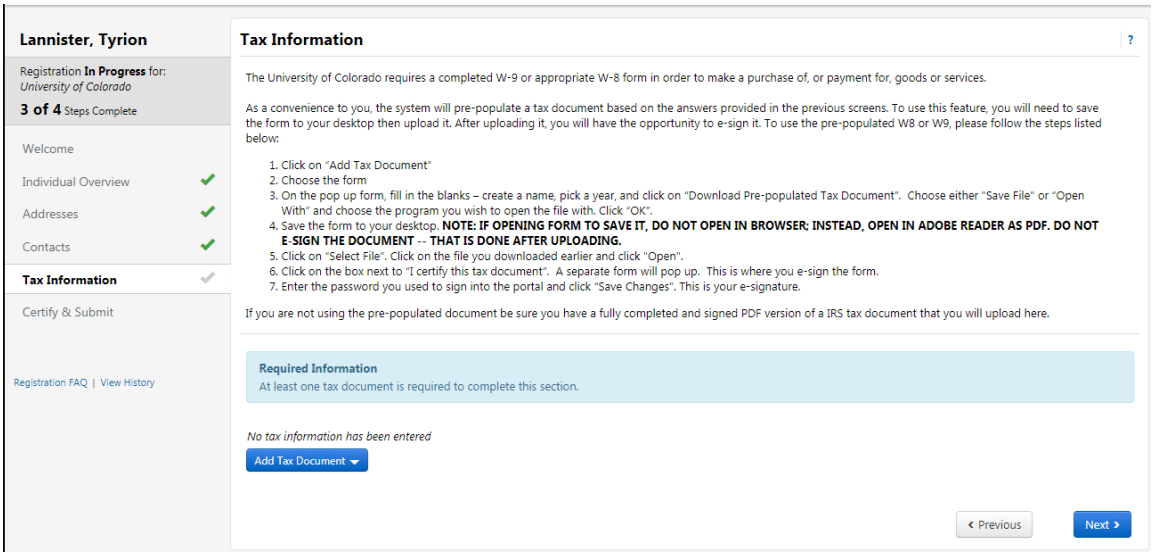
You will then be asked to add a primary contact for this address.

This section will be pre-populated with the information you entered on the account creation page. Again, you can enter anything for the contact label.

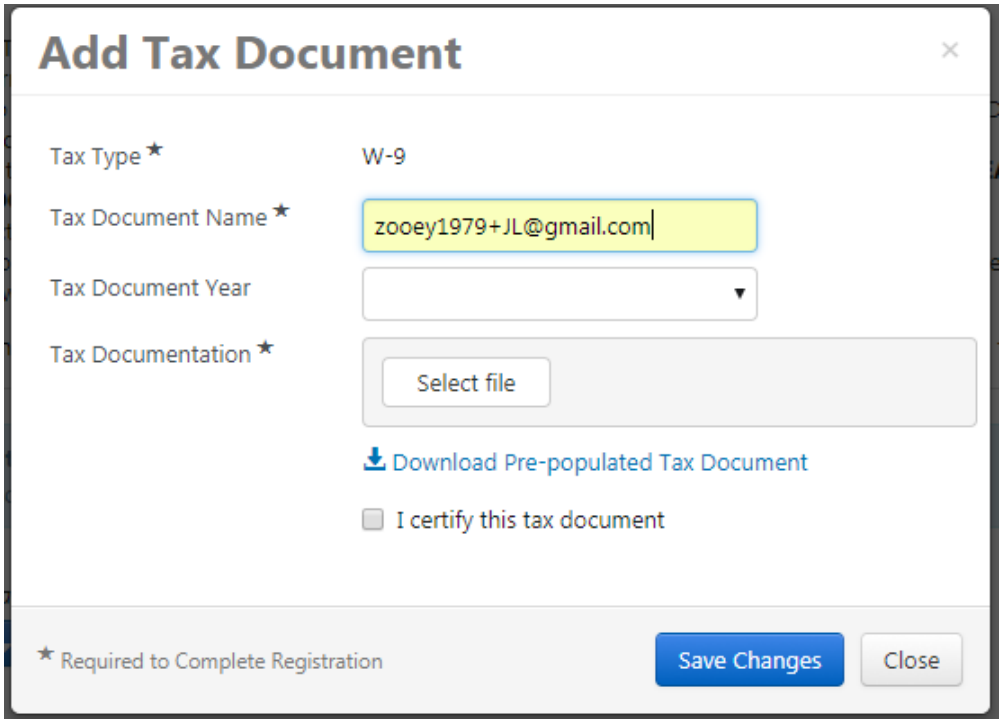
Make sure the information is correct and click Save Changes



Tax Information



Here you will be required to upload your tax document. There are a few ways this can be accomplished. The first is to use the pre-populated document, which has been completed by the system based on your previous answers. If you choose to use this method, click the Add Tax Document button and click on W-9 in the dropdown menu. **If you identified yourself as a foreign individual in the Individual Overview section at the beginning of the registration, you will see a list of W-8 forms. If you are unsure of which to choose, please contact alicia.dandeneau@cu.edu or kendra.zafiratos@cu.edu from our international tax office for assistance.**



Use the Download Pre-populated Tax Document link to download a copy of the pre-populated tax document.

Do not make any changes to the document. Save it as is to your desktop.

Form **W-9**
(Rev. December 2014)
Department of the Treasury
Internal Revenue Service

Request for Taxpayer Identification Number and Certification

Give Form to the requester. Do not send to the IRS.

Print or type
See Specific Instructions on page 2.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.
Lannister, Tyrion

2 Business name/disregarded entity name, if different from above

3 Check appropriate box for federal tax classification; check only one of the following seven boxes:
☑ Individual/sole proprietor or single-member LLC ☐ C Corporation ☐ S Corporation ☐ Partnership ☐ Trust/estate
☐ Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=partnership) ▶
Note. For a single-member LLC that is disregarded, do not check LLC; check the appropriate box in the line above for the tax classification of the single-member owner.
☐ Other (see instructions) ▶

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):
Exempt payee code (if any)
Exemption from FATCA reporting code (if any)
(Applies to accounts maintained outside the U.S.)

5 Address (number, street, and apt. or suite no.)
Dragonstone Castle Blackwater Bay

Requester's name and address (optional)

6 City, state, and ZIP code
The Crownlands, CO 80226

7 List account number(s) here (optional)

Part I **Taxpayer Identification Number (TIN)**

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 Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN* on page 3.

Note. If the account is in more than one name, see the instructions for line 1 and the chart on page 4 for guidelines on whose number to enter.

Social security number
1 1 1 - 0 1 - 7 1 2 3

Or

Employer identification number
-

Part II **Certification**

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions on page 3.

Sign Here Signature of U.S. person ▶ Date ▶

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. Information about developments affecting Form W-9 (such as legislation enacted after we release it) is at *www.irs.gov/fw9*.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following:

- Form 1099-INT (interest earned or paid)
- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

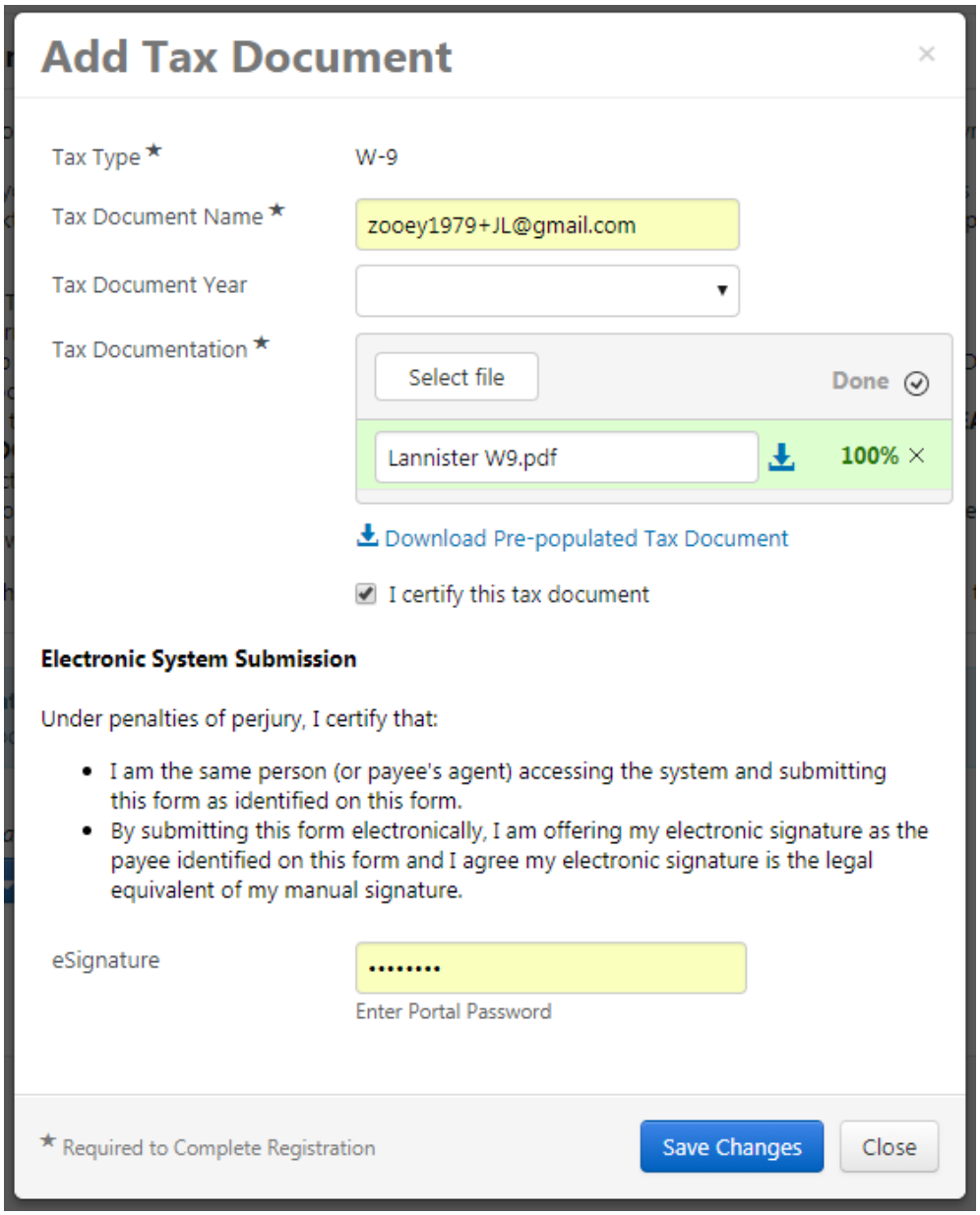
If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding? on page 2.

By signing the filled-out form, you:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
2. Certify that you are not subject to backup withholding, or
3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income, and
4. Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting, is correct. See *What is FATCA reporting?* on page 2 for further information.

Cat. No. 10231X Form **W-9** (Rev. 12-2014)

Go back to the Add Tax Document window and click Select file Select the tax document you just saved to your desktop. Check the ☑ I certify this tax document box. This will bring up the eSignature field. Enter your portal password, which is the password you created to log into the portal, and click the Save Changes button.

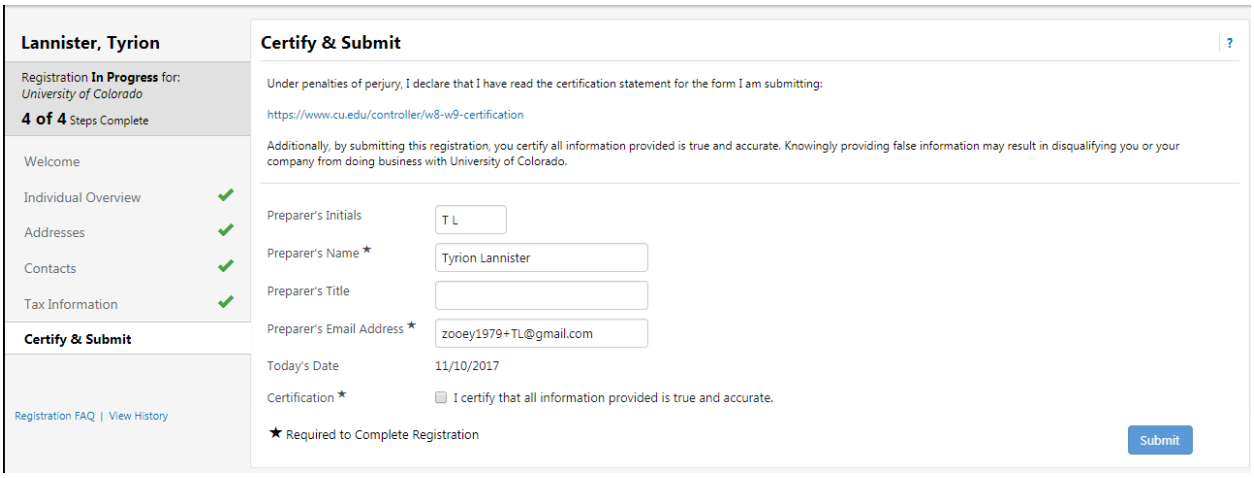


Another option for this step is to fill out a W9 by hand and upload a PDF of the form to your profile. If you choose this option, there is no need to use the eSignature function. You can also send the PDF to CUSupplier@cu.edu or mail it to:

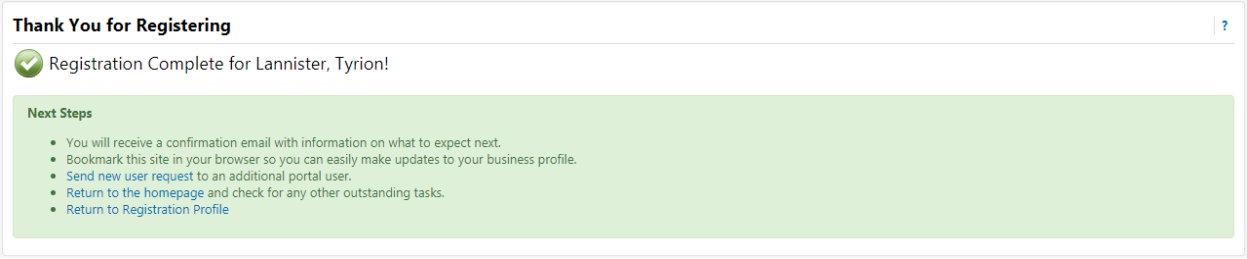
1800 Grant Street
Suite 500
Denver, CO 80203

Certify & Submit

Once your tax document has been attached to your profile, you will be able to certify and submit your registration for final review. Click the Proceed to Certify and Submit » button.



Check the I certify that all information provided is true and accurate. box and click Submit



Your registration is now complete. It will be reviewed by CU's supplier management team and you will be contacted if more information is required. If you have any questions during this process, please contact CUSupplier@cu.edu.