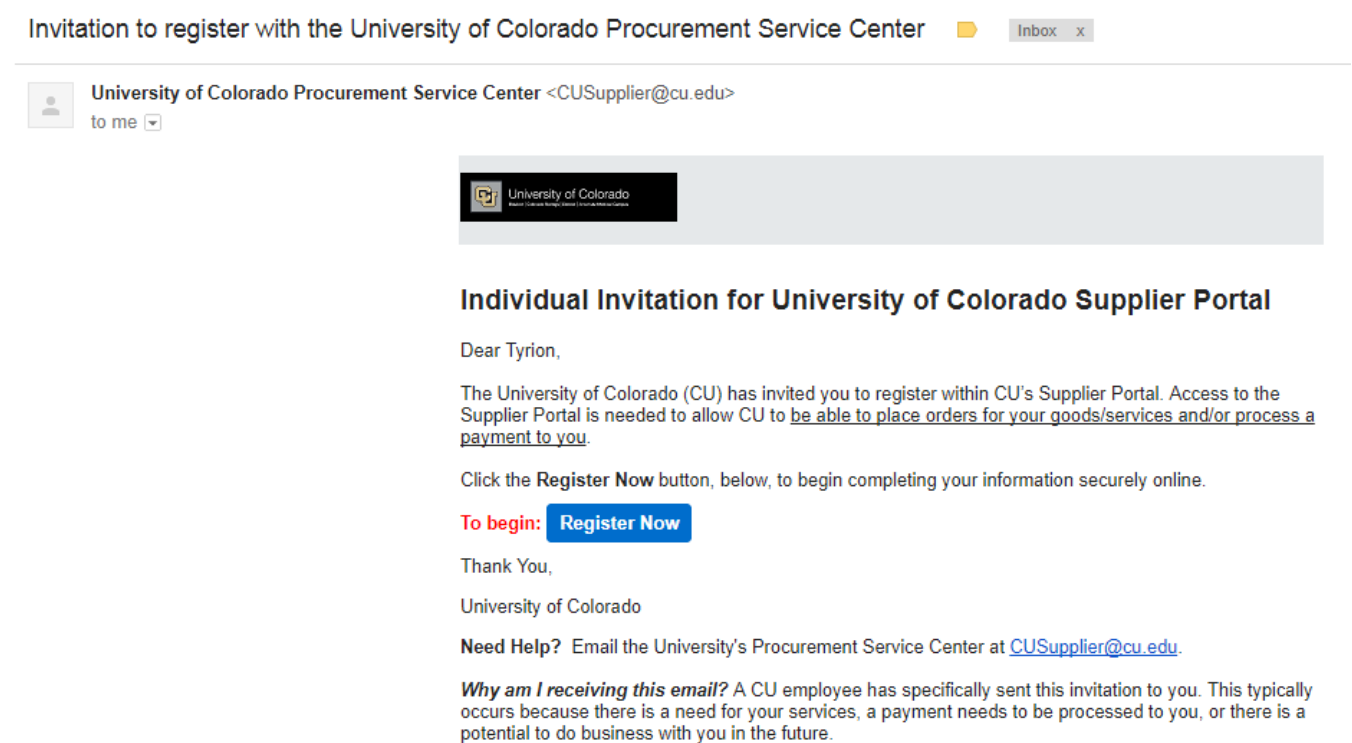


Supplier Portal Registration Guide: Individual


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:



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.



University of Colorado

Boulder | Colorado Springs | Denver | Anschutz Medical Campus

[Registration Checklist](#)
[Registration FAQ](#)
[Registration Tutorial](#)

Welcome to Supplier Registration

You will need to have the following information in order to complete the registration:

- Tax ID
- Address
- Contact information
- W9

Please see our [step by step guide](#) for details on the complete registration process.

CONTINUE WITH REGISTRATION

Please contact Procurement Service Center at CUSupplier@cu.edu for assistance.

POWERED BY JAGGAER


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



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Supplier Registration

[Registration Tutorial](#)

ENGLISH

Your Contact Info

First Name *
Tyron

Last Name *
Lannister

Title

Phone Number *
ext.

International phone numbers must begin with +

Preferred Time Zone *
MDT/MST - Mountain Standard Time (US/Mountain)

Your Login

Email *
zoey1979+TL@gmail.com

Confirm Email *

Password *
[eye icon]

Re-Enter Password *
[eye icon]

Account Recovery Question *
Choose your option

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.

Lannister, Tyrion	Welcome to Supplier Registration ?
Registration In Progress for: University of Colorado 0 of 4 Steps Complete	
Welcome	
Individual Overview ✓	
Addresses ✓	
Contacts ✓	
Tax Information ✓	
Certify & Submit	
Registration FAQ View History	
	<p>You will need to have the following information in order to complete the registration:</p> <ul style="list-style-type: none">• Tax ID• Address• Contact information• W9 <p>Please see our step by step guide for details on the complete registration process.</p> <hr/> <p>Required to Start Registration</p> <p>First Name * <input type="text" value="Tyrion"/></p> <p>Last Name * <input type="text" value="Lannister"/></p> <p>★ Required to Complete Registration</p> <p>Next > Save Changes</p>

Verify the information and click

[Next >](#)

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.**

Lannister, Tyrion	Individual Information ?
Registration In Progress for: University of Colorado 0 of 4 Steps Complete	
Welcome	
Individual Overview ✓	
Addresses ✓	
Contacts ✓	
Tax Information ✓	
Certify & Submit	
Registration FAQ View History	
	<p>The information entered on this page allows us to obtain general information and ensure we have the most up-to-date information in our system.</p> <p>You received this registration as an individual - which means that any payments made, will be made payable to you as person, not to the company you work for.</p> <p>For the tax id number, please enter your social security number. This information will be masked after entry for your security.</p> <hr/> <p>Country of Origin ⓘ <input type="text"/></p> <div>Legal Structure is used by the IRS to classify the form of a business organization and ultimately determines which tax documentation is required. Please provide the appropriate Legal Structure information as it is currently stated with the IRS. For more information about business structures, please visit www.irs.gov.</div> <p>Legal Structure * ⓘ <input type="text"/></p> <p>Tax ID Number * <input type="text"/></p> <p>Website <input type="text" value=""/></p> <p>★ Required to Complete Registration</p> <p>< Previous Next > Save Changes</p>

When you have completed the information on this page, click

[Next >](#)

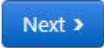
Addresses

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

The screenshot shows a registration interface for 'Lannister, Tyron'. On the left is a sidebar with a progress indicator '1 of 4 Steps Complete' and a list of steps: Welcome, Individual Overview (marked with a green check), Addresses (highlighted with a blue bar and a checkmark), Contacts, Tax Information, and Certify & Submit. The main area is titled 'Addresses' and contains a message: 'Please enter an address to help us route information and communication correctly. This address would be the location that checks are sent to you from the University of Colorado.' Below this is a light blue box labeled 'Required Information' stating 'At least one address is required to complete this section.' A message 'No addresses have been entered' is followed by a blue 'Add Address' button. A link 'Hide Inactive Addresses' is on the right. At the bottom right are 'Previous' and 'Next' buttons.

Click on the  button.

The 'Add Address' modal is shown with a close button in the top right. The title is 'Add Address'. Below it is a sub-header 'Address Details (Step 1 of 2)' with a help icon. The form contains several fields: 'What would you like to label this address? *' with a text input and an example 'Example: Headquarters, Houston Office'; 'Country *' with a dropdown menu; 'Address Line 1 *', 'Address Line 2', and 'Address Line 3' with text inputs; 'City/Town *', 'State/Province', and 'Postal Code' with text inputs; 'Phone' and 'Toll Free Phone' with text inputs, each followed by an 'ext.' field and a note 'International phone numbers must begin with +'; and 'Fax' with a text input and the same note. At the bottom left is a legend '★ Required to Complete Registration' and at the bottom right is a blue 'Next >' button.

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

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](#)

Add Address

Primary Contact For This Address (Step 2 of 2)

You can also update and add Contacts later from the Contacts page.

☒ Enter New Contact

☐ Not Applicable

Contact Label *

First Name *

Tyrion

Last Name *

Lannister

Position Title

Email *

zooey1979+TL@gmail.com

Phone *

+1 720-380-5372

ext.

International phone numbers must begin with +

Toll Free Phone

ext.

International phone numbers must begin with +

Fax

International phone numbers must begin with +

★ Required to Complete Registration

< Previous

Save Changes

Tax Information

Lannister, Tyrion

Registration In Progress for:
University of Colorado

3 of 4 Steps Complete

Welcome

Individual Overview

Addresses

Contacts

Tax Information

Certify & Submit

Registration FAQ | View History

Tax Information

The University of Colorado requires a completed W-9 or appropriate W-8 form in order to make a purchase of, or payment for, goods or services.

As a convenience to you, the system will pre-populate a tax document based on the answers provided in the previous screens. To use this feature, you will need to save the form to your desktop then upload it. After uploading it, you will have the opportunity to e-sign it. To use the pre-populated W8 or W9, please follow the steps listed below:

1. Click on "Add Tax Document"
2. Choose the form
3. On the pop up form, fill in the blanks – create a name, pick a year, and click on "Download Pre-populated Tax Document". Choose either "Save File" or "Open With" and choose the program you wish to open the file with. Click "OK".
4. Save the form to your desktop. **NOTE: IF OPENING FORM TO SAVE IT, DO NOT OPEN IN BROWSER; INSTEAD, OPEN IN ADOBE READER AS PDF. DO NOT E-SIGN THE DOCUMENT -- THAT IS DONE AFTER UPLOADING.**
5. Click on "Select File". Click on the file you downloaded earlier and click "Open".
6. Click on the box next to "I certify this tax document". A separate form will pop up. This is where you e-sign the form.
7. Enter the password you used to sign into the portal and click "Save Changes". This is your e-signature.

If you are not using the pre-populated document be sure you have a fully completed and signed PDF version of a IRS tax document that you will upload here.

Required Information

At least one tax document is required to complete this section.

No tax information has been entered

Add Tax Document

< Previous

Next >

Here you will be required to upload your tax document. Please 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 either reference the International Tax website, <https://www.cu.edu/doc/outintfaqw-8formsnonusindsupfinal082721pdf>, or contact IntlTax@cu.edu.**

Add Tax Information ▼

- W-8BEN
- W-8ECI
- W-8EXP
- W-8IMY
- 8233

Enter a name for your tax document and click the **Sign Document** button.

Add Tax Document

×

Tax Type ★

W-9

Tax Document Name ★

Tax Document Year

Signature Status

Not Signed

Tax Documentation ★

Sign Document

☐ Manually upload the document instead

★ Required to Complete Registration

Save Changes

Close

Your document will open in a separate browser window. **Please make sure pop-ups are enabled for this site.**

Please Review & Act on These Documents

University of Colorado Total Contract Manager
University of Colorado

DocuSign

Please read the Electronic Record and Signature Disclosure.
☒ I agree to use electronic records and signatures.

CONTINUE OTHER ACTIONS ▾

DocuSign Envelope ID: B525363D-4638-4A83-8011-950B64DB33C6

DEMONSTRATION DOCUMENT ONLY
PROVIDED BY DOCUSIGN ONLINE SIGNING SERVICE
999 3rd Ave, Suite 1700 • Seattle • Washington 98104 • (206) 219-0200
www.docuSign.com

W-9
Form (Rev. November 2017)
Department of the Treasury
Internal Revenue Service

Request for Taxpayer Identification Number and Certification

Go to www.irs.gov/FormW9 for instructions and the latest information.

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

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 of the person whose name is entered on line 1. 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) in the box below. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.
☐ Other (see instructions) in the box below

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.) See instructions.
Address

6. City, state, and ZIP code
Denver, CO 80218


7. List account number(s) here (optional)

8. Requester's name and address (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 instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.
Note: If this account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

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

Check the ☒ I agree to use electronic records and signatures box and click the CONTINUE button.

Click  and adopt and sign your signature.

Adopt Your Signature

Confirm your name, initials, and signature.

* Required

Full Name*
Tyrion Lannister

Initials*
TL

SELECT STYLE **DRAW**

PREVIEW [Change Style](#)

DocuSigned by:
Tyrion Lannister
64A55CCEE2454DF...

DS
TL

By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

ADOPT AND SIGN **CANCEL**

Click the **FINISH** button. This will take you back to the registration. Click **Save Changes** then click **Next >**

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.

Lannister, Tyrion	Certify & Submit
Registration In Progress for: <i>University of Colorado</i> 4 of 4 Steps Complete	Under penalties of perjury, I declare that I have read the certification statement for the form I am submitting: https://www.cu.edu/controller/w8-w9-certification 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 University of Colorado.
Welcome	
Individual Overview ✓	Preparer's Initials <input type="text" value="T L"/>
Addresses ✓	Preparer's Name * <input type="text" value="Tyrion Lannister"/>
Contacts ✓	Preparer's Title <input type="text"/>
Tax Information ✓	Preparer's Email Address * <input type="text" value="zoey1979+TL@gmail.com"/>
Certify & Submit	Today's Date <input type="text" value="11/10/2017"/>
Registration FAQ View History	Certification * <input type="checkbox"/> I certify that all information provided is true and accurate.
	★ Required to Complete Registration <input type="button" value="Submit"/>

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

Thank You for Registering

[?](#)

Registration Complete for Lannister, Tyrion!

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](#)

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.