

Supplier Portal Registration Guide: Independent Contractor and Entity

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:



Supplier Invitation for University of Colorado (TEST)

Dear Madam Pudifoot's Tea Room,

The University of Colorado (TEST) (CU) has invited you, Madam, to register as a potential supplier within CU's Supplier Portal. Access to the Supplier Portal is required to submit your tax documents securely online and for CU to establish you as a current supplier available for all University faculty and staff to issue purchase orders or pay invoices for Madam Pudifoot's Tea Room. However, the CU Supplier Portal offers additional benefits, such as:

- View/Respond to Solicitations
- Manage Madam Pudifoot's Tea Room's Company Data and Contact Information
- View the Status of Invoices submitted against a purchase order for Madam Pudifoot's Tea Room
- Securely transmit tax documents to CU

Becoming a University of Colorado (TEST) network supplier is free, easy and it only takes a few minutes to join. By selecting the "Register Now" button below, you will be routed to a secure website to complete the registration process. Upon successful completion of your registration, you will have 24/7 access to your secure portal.

To begin your registration: [Register Now](#)

Thank You,

University of Colorado (TEST)

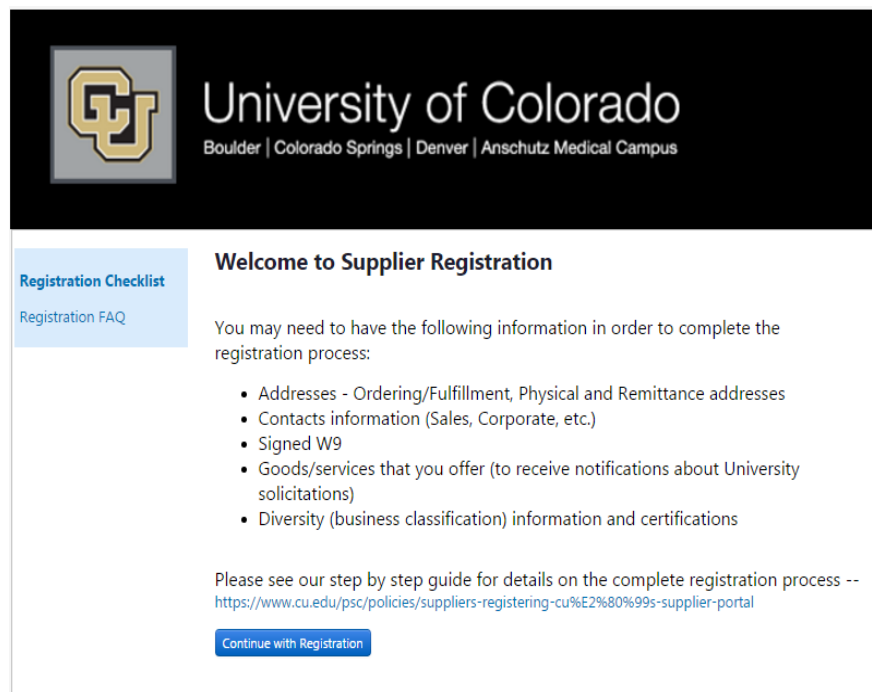
Need help? Email the CU Procurement Service Center at cusupplier@cu.edu, or reply to this email.

Why am I receiving this email?

- You have been identified as a contact for Madam Pudifoot's Tea Room
- CU wants to be sure you are available for potential purchases and/or payments

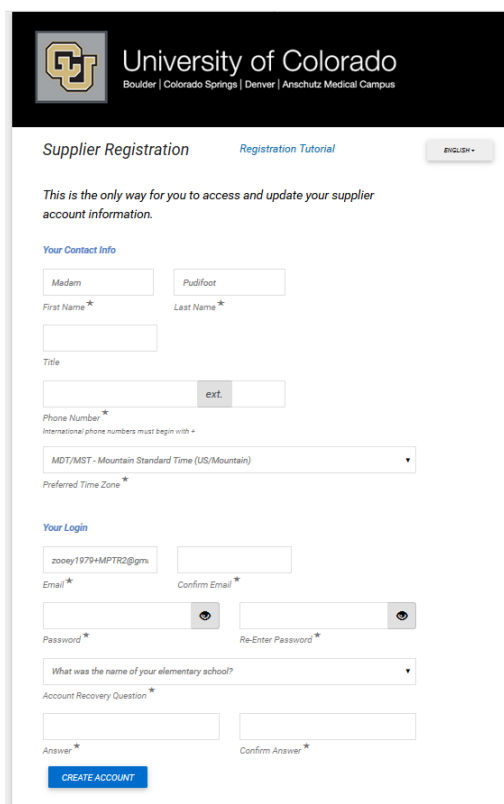
You must use the [Register Now](#) link contained in the email to access your profile. If you do not receive the link, please contact CUSupplier@cu.edu. If you start your registration, but need to come back to it at a later date, you can access your profile at www.cu.edu/psc/supplierlogin

Once you click the [Register Now](#) link from the email, you will be brought to the welcome page for the supplier registration.



The image shows the 'Welcome to Supplier Registration' page for the University of Colorado. At the top is the university's logo and name, with locations listed: Boulder, Colorado Springs, Denver, and Anschutz Medical Campus. On the left, there are links for 'Registration Checklist' and 'Registration FAQ'. The main heading is 'Welcome to Supplier Registration'. Below it, a message states: 'You may need to have the following information in order to complete the registration process:'. A bulleted list follows: 'Addresses - Ordering/Fulfillment, Physical and Remittance addresses', 'Contacts information (Sales, Corporate, etc.)', 'Signed W9', 'Goods/services that you offer (to receive notifications about University solicitations)', and 'Diversity (business classification) information and certifications'. Below the list, a message says: 'Please see our step by step guide for details on the complete registration process -- <https://www.cu.edu/psc/policies/suppliers-registering-cu%E2%80%99s-supplier-portal>'. At the bottom is a blue button labeled 'Continue with 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.



The image shows the 'Supplier Registration' account creation form for the University of Colorado. At the top is the university's logo and name, with locations listed: Boulder, Colorado Springs, Denver, and Anschutz Medical Campus. The page has a header with 'Supplier Registration', a link to 'Registration Tutorial', and a language dropdown set to 'ENGLISH'. A message states: 'This is the only way for you to access and update your supplier account information.' The form is divided into two sections: 'Your Contact Info' and 'Your Login'. The 'Your Contact Info' section includes fields for 'First Name' (with a dropdown for 'Madam'), 'Last Name' (with a dropdown for 'Pudifoot'), 'Title', 'Phone Number' (with an 'ext.' field), and 'Preferred Time Zone' (with a dropdown for 'MDT/MST - Mountain Standard Time (US/Mountain)'). The 'Your Login' section includes fields for 'Email' (with a dropdown for 'zoosy197hMPTR2@gmail'), 'Confirm Email', 'Password', 'Re-Enter Password', and 'Account Recovery Question' (with a dropdown for 'What was the name of your elementary school?'). There are also fields for 'Answer' and 'Confirm Answer'. At the bottom is a blue button labeled 'CREATE ACCOUNT'.

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

Create Account

Welcome

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 Policy.

Madam Pudifoot's Tea Room

Registration **In Progress** for:
University of Colorado (TEST)
0 of 7 Steps Complete

Welcome

Company Overview ✓
Business Details ✓
Addresses ✓
Contacts ✓
Locations ✓
Diversity ✓
Tax Information ✓
Certify & Submit

Registration FAQ | View History

Welcome to Supplier Registration

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

- Ordering/Fulfillment and Remittance addresses
- Contacts information (Sales, Corporate, etc.)
- Signed W9

In addition, you may need to provide the following:

- Goods/services that you offer
- Diversity (business classification) information and certifications

For a step by guide on the process - <http://www.google.com>

Required to Start Registration

Legal Company Name *

★ Required to Complete Registration

Next > Save Changes

Need Help?

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

Next >

Company Overview

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Madam Pudifoot's Tea Room

Registration **In Progress** for:
University of Colorado (TEST)
0 of 7 Steps Complete

Welcome

Company Overview ✓
Business Details ✓
Addresses ✓
Contacts ✓
Locations ✓
Diversity ✓
Tax Information ✓
Certify & Submit

Registration FAQ | View History

Company Overview

Doing Business As (DBA)

Country of Origin

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.

Legal Structure *

Tax ID Number *

Website

★ Required to Complete Registration

< Previous Next > Save Changes

Need Help?

This is the page where you can add your DBA (doing business as) name, if applicable, and your tax information. If you do not have a DUNS number (Dun & Bradstreet) please check the “no” box. You are not required to have a DUNS number to register as a supplier with the university. **If you are an international supplier, please choose Non-US Based Entity from the Legal Structure menu. The tax ID number field will then become optional.** When you have completed the information on this page, click

Next >

Business Details

This is where you will provide your Sales Territories, NAICS, and commodity codes. This information helps us to identify local businesses and independent contractors, invite appropriate suppliers to solicitation events as well as report on types of goods/services purchased.

Sales Territories

Local is Colorado owned and operated.

Is Your Business a Local Supplier? ☒ Yes ☐ No

Is Your Business a National Supplier? ☐ Yes ☒ No

U.S. Service Area

International Service Area

Madam Pudifoot's Tea Room

Registration **In Progress** for:
University of Colorado (TEST)

1 of 7 Steps Complete

Welcome

Company Overview

Business Details

Addresses

Contacts

Locations

Diversity

Tax Information

Certify & Submit

Registration FAQ | View History

Business Details

Products and Services

The North American Industry Classification System (**NAICS**) classifies business establishments for the purpose of collecting, analyzing, and publishing statistical data related to the U.S. economy. The **NAICS** industry **codes** define establishments based on the activities in which they are primarily engaged.

NAICS Codes *No Primary NAICS Code Selected*

Commodity Codes

Keywords

700 characters remaining

Additional Questions

☐ Payment Plus is a program which offers payment in net 10 days as compared to the paper check of net 30 days. If you would like more information on this program, please select the box and a PSC representative will contact you to discuss the program.

★ Required to Complete Registration

< Previous

Next >

Save Changes

Need Help?

We recommend using the search feature to determine your NAICS code. Enter text related to the type of business you do. To get the most complete list of available options enter just 1 keyword related to the kind of business.

For independent contractors, we suggest using "services" as the keyword in the NAICS search bar. This will provide you with a comprehensive list of service-related codes from which to choose.

NAICS Codes

Use Search or drill down in the tree view to select a Primary NAICS Code.

NAICS Code/Description/Keyword

0 Selected Codes

NAICS Code

- 11 - Agriculture, Forestry, Fishing and Hunting
- 21 - Mining, Quarrying, and Oil and Gas Extraction
- 22 - Utilities
- 23 - Construction
- 31 - Manufacturing
- 32 - Manufacturing
- 33 - Manufacturing
- 42 - Wholesale Trade
- 44 - Retail Trade
- 45 - Retail Trade
- 48 - Transportation and Warehousing
- 49 - Transportation and Warehousing
- 51 - Information
- 52 - Finance and Insurance
- 53 - Real Estate and Rental and Leasing
- 54 - Professional, Scientific, and Technical Services

The commodity code list is a shortened/condensed version of codes used internally by CU. There are only 21 selections, but you can select more than one.

Commodity Codes

Search

0 Selected Codes

Showing 1 - 21 of 21 Results

Results Per Page 30

Sort by: Commodity Code

Page 1 of 1

Commodity Code	Description
01	Advertising, Marketing & Print Services
02	Athletics, Apparel & Linens
03	Benefits
04	Books, Subscriptions, & Library Services
05	Construction Materials & Services
06	Facilities Related Supplies, Materials & Services
07	Food Related Products & Services
08	Furniture
09	IT Hardware & Maintenance
10	IT Software & Maintenance
11	Office / Classroom Supplies & Equipment
12	Official Function
13	Professional Services & Training
14	Real Estate
15	Scientific / Laboratory / Medical Equipment & Supplies
16	Storage, Moving & Mailing Services
17	Subcontracts / Sponsored Programs
18	Telecommunications / AV
19	Travel
20	Vehicles & Equipment/Transportation
21	IT Professional Services

Done

Close

Once you have chosen the descriptions for your business, please click

Next >

Addresses

You will need to enter fulfillment and remit to addresses in order to proceed. The fulfillment address is where the PO will be sent. The remittance address is where payment will be sent, and must match the remit to address on your invoices

Madam Puddifoot's Tea Shop

Registration In Progress for: University of Colorado

3 of 7 Steps Complete

Welcome

Company Overview

Business Details

Addresses

Contacts

Locations

Diversity

Tax Information

Certify & Submit

Registration FAQ | View History

Addresses

Your **Order/Fulfillment** address is where your company receives and processes requests (purchase orders) for goods/services.

Your **Remit** address is where your company receives payments for goods/services.

Your **Physical** address is where your company receives mail or other official communications.

These addresses can be the same.

Required Information

The following address types are required to complete registration:

- Fulfillment
- Remittance

No addresses have been entered

Add Address

Hide Inactive Addresses

< Previous

Next >

Click on the **Add Address** button. Anything can be entered for the address label. Check all address types that apply to the address you will be entering and click **Next >**

Add Address

Basic Information (Step 1 of 4)

Errors

- Address Label: Required field cannot be empty.

What would you like to label this address? *

100 Grant Street

Example: Headquarters, Houston Office

Which of the following business activities take place at this address? (select all that apply) *

☒ Takes Orders (fulfillment)

☒ Receives Payment (remittance)

☒ Other (physical)

★ Required to Complete Registration

Next >

If the entry is for fulfillment, you will need to enter an email or fax number where POs can be sent. The remit to address is where payment will be sent and should match the address on the invoice you will be submitting.

Add Address

Address Details (Step 2 of 4)

?

How would you like to receive purchase orders for this fulfillment address? *

Country *

Address Line 1 *

Address Line 2

Address Line 3

City/Town *

State/Province

Postal Code

Phone

ext.

For international numbers, begin the number with +

Toll Free Phone

ext.

For international numbers, begin the number with +

Fax

For international numbers, begin the number with +

★ Required to Complete Registration

< Previous

Next >

Fill out all the required information and click

Next >

You will then be able to add contact information for the individual who will be managing your supplier record. The fulfillment, remittance, and physical contact boxes are automatically checked. **You will also be required to enter a Sales contact in order to complete the registration.**

Add Address

You can also update and add 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

☐ PO Failure

Contact Label *

First Name *

Last Name *

Position Title

Email *

Phone *

ext.

International phone numbers must begin with +

Toll Free Phone

ext.

International phone numbers must begin with +

<

>

★ Required to Complete Registration

< Previous

Next >

At this point, you will be able to create a new user account for the contact person you added, if it is someone other than yourself. This individual will automatically be sent a new user request via email, which will allow them to create their own login for the portal.

Selecting this option will automatically send an email to this contact inviting them to register for an account

Create new user account for this contact? ☐ Create new user account for this contact?

You will then be asked to assign a location for this address. This is a requirement for CU so that departments can build POs and payments can be made to you. The location label should be a description of the address and can be the same as the address label.

Add Address

Assign this Address to a Location (Step 4 of 4) ?

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

Locations represent the various places in which your business operates. Some examples of locations are regional offices, fulfillment centers, divisions, etc. If your organization only operates out of one location, please enter "Main Office" for the Location Label.

☒ Enter New Location

What would you like to label this location? *

Description

700 characters remaining

★ Required to Complete Registration

[< Previous](#)

Save Changes

Click

Save Changes

Diversity

CU strives to do business with diverse companies, although this does not guarantee, nor preclude any business transaction. However, we do want to know if you qualify as a diverse supplier. If your business can be classified as any of those shown below, please choose Yes for the question at the top of the page. If you select No or Decline to Answer, you will be considered a large business. For more information on

small business classifications, please visit the SBA website at <https://www.sba.gov/contracting/getting-started-contractor/make-sure-you-meet-sba-size-standards/table-small-business-size-standards>

Diversity ?

The University of Colorado strives to do business with diverse companies.

Add any other diversity classifications, as appropriate for your company, below.

Furthermore, I understand that any person who misrepresents a firm's status as a small, HUBZone small, small disadvantaged, women-owned, or Veteran or Service-Disabled Veteran-Owned Small Business concern in order to obtain a contract awarded under the Small Business Act shall:

- (1) be punished by imposition of fine, imprisonment, or both;
- (2) be subject to administrative remedies including suspension and debarment; and,
- (3) be ineligible for participation in programs conducted under the Authority of the Act.

Required Information
Please click on the "Add Diversity Classifications" button to declare any Diversity Classifications that are applicable to you or to state that you do not qualify.

Click the button below to choose the diversity classifications that apply to your business.

Add Diversity Classifications

Additional Questions

Are you considered a small business? *

< Previous

Next >

Save Changes

Click the **Add Diversity Classifications** button.

Diversity Classifications x

▼ No Classification

☐ Does Not Qualify As A Diverse Supplier (DoesNotQualify)

▼ Federal Diversity Classifications

☐ Small Business Enterprise (SBE)

- ☐ HUBZone Small Business (HUBZ)
- ☐ Service-Disabled Veteran-Owned Small Business (SDVOSB)
- ☐ Small Disadvantaged Business (SDB)
- ☐ Veteran-Owned Small Business (VOSB)
- ☐ Woman-Owned Small Business (WOSB)
- ☐ Alaskan Native Corporations / Indian Tribe (ANC)

☐ Disabled Veteran Owned Business (DVBE)

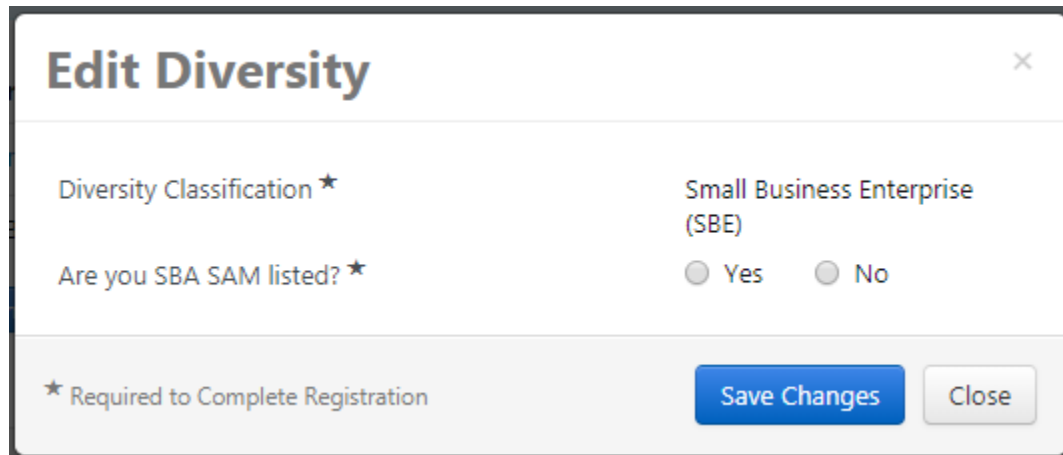
- ☐ Historically Black Colleges and Universities (HBCU)
- ☐ Indian Tribes (IT)
- ☐ Large Business Enterprise (LBE)
- ☐ Minority Owned Large Business (MOLB)
- ☐ Woman Owned Large Business (WOLB)

Done

Close

***If you are an international supplier, please choose “Does Not Qualify As A Diverse Supplier” as these classifications only pertain to domestic suppliers.**

If you choose “Small Business Enterprise”, you will need to click the edit button next to that entry and enter your CAGE code if you are SBA SAM listed.



Edit Diversity [Close]

Diversity Classification ★

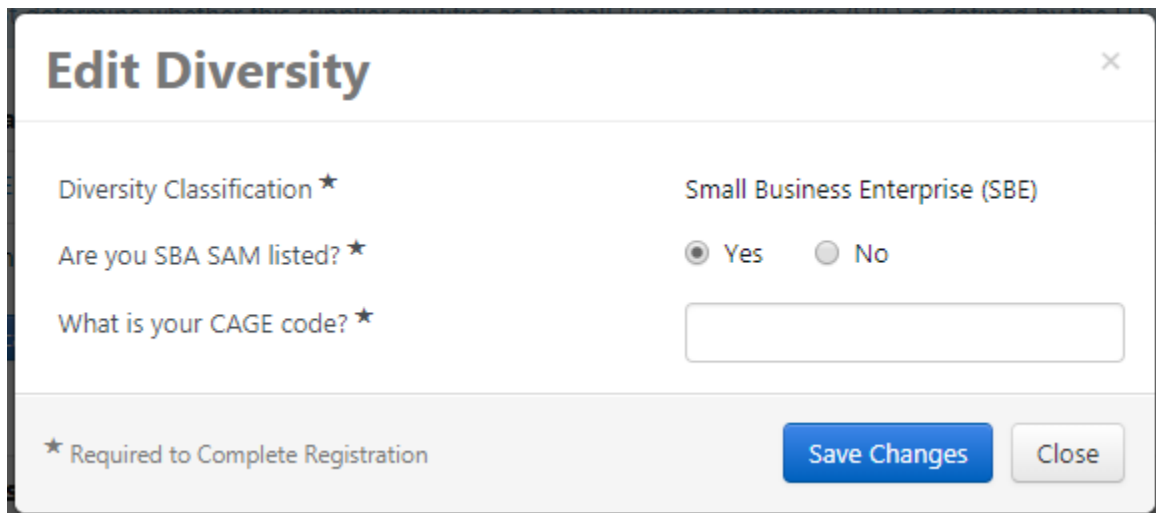
Are you SBA SAM listed? ★

Small Business Enterprise (SBE)

☒ Yes ☐ No

★ Required to Complete Registration

[Save Changes](#) [Close](#)



Edit Diversity [Close]

Diversity Classification ★

Are you SBA SAM listed? ★

What is your CAGE code? ★

Small Business Enterprise (SBE)

☒ Yes ☐ No

★ Required to Complete Registration

[Save Changes](#) [Close](#)

Once you have provided your diversity information, indicate whether or not you are a small business under Additional Questions, then click [Next >](#)

Tax Information

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.

Madam Pudifoot's Tea Room

Registration **In Progress** for:
University of Colorado (TEST)
5 of 7 Steps Complete

Welcome

Company Overview ✓

Business Details ✓

Addresses ✓

Contacts ✕

Locations ✓

Diversity ✓

Tax Information ✓

Certify & Submit

Registration FAQ | View History

Tax Information ?

The University of Colorado requires a completed W9 or appropriate W8 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. Please use the DocuSign feature to e-sign your tax form. For instructions on this process, please visit [our website](#).

If you will not be using the pre-populated document, be sure to upload a fully completed and signed PDF version of your W9 or W8. Please make sure that your form is the most recent version published by the IRS.

Required Information

The following tax document are required to complete registration:

- W-9

No tax information has been entered

Add Tax Document ▼

< Previous

Next >

If you choose to use this method, click the button and choose which document you would like to upload. If you are a domestic supplier, your only choice will be a W9. **International suppliers will be shown a list of W8s to choose from. 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.**

No tax information has been entered

Add Tax Document ▼

W-9

W-8BEN

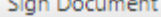
W-8BEN-E

W-8ECI

W-8EXP

W-8IMY

8233

Enter a name for your tax document and click the  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-up blockers are disabled on your browser so the document can open in a separate window.**

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.

CONTINUEOTHER ACTIONS

DocuSign Envelope ID: 796B8FC7-76AB-486E-95FA-5FAF5F139B69

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

Form W-9
(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.
Madam PuddiFoot's Tea Shop

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 space below the box.
Note: Check the appropriate box in the line above for the tax classification of the single-member owner. 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) ☐

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.
Requester's name and address (optional)

6 City, state, and ZIP code

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 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 the 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.


Social security number
or
Employer identification number

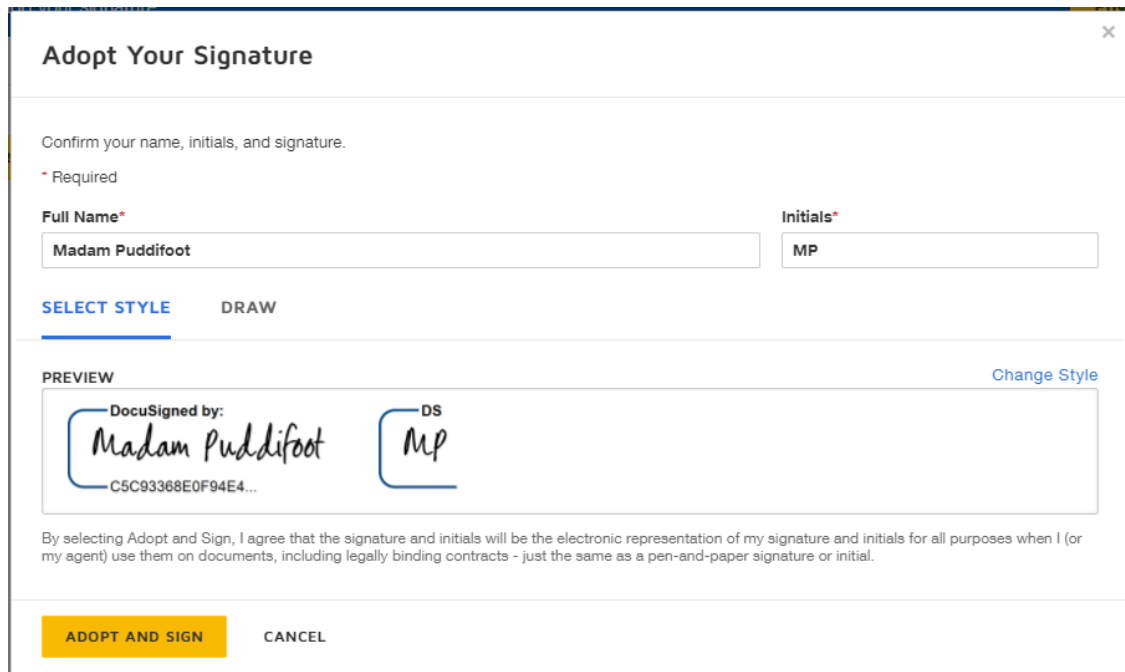
Part II Certification
Under penalties of perjury, I certify that:
1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have 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

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

CONTINUE

button. Click  and adopt and sign your signature.



Click the **FINISH** button. This will take you back to the registration. Click

Save Changes

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 e-signature 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

You will then be able to certify and submit your registration for final review. Click the [Proceed to Certify and Submit >>](#) button. Enter your name and email address. Check the ☐ I certify that all information provided is true and accurate. box and click [Submit](#)

Madam Puddifoot's Tea Shop

Registration **In Progress** for:
University of Colorado (TEST)

6 of 6 Steps Complete

Welcome

Company Overview ✓

Business Details ✓

Addresses ✓

Contacts ✓

Diversity ✓

Tax Information ✓

Certify & Submit

[Registration FAQ](#) | [View History](#)

Certify & Submit ?

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>

I understand that any person who misrepresents a firm's status as a small, HUBZone small, small disadvantaged, women-owned, or Veteran or Service-Disabled Veteran-Owned Small Business concern in order to obtain a contract awarded under the Small Business Act shall:

- (1) be punished by imposition of fine, imprisonment, or both;
- (2) be subject to administrative remedies including suspension and debarment; and,
- (3) be ineligible for participation in programs conducted under the Authority of the Act.

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.

Preparer's Name *

Madam Puddifoot

Preparer's Email Address *

zoee1979+MP2@gmail.com

Today's Date

5/2/2018

Certification *

☒ I certify that all information provided is true and accurate.

★ Required to Complete Registration

Submit

Thank You for Registering

 ?

✓ Registration Complete for Madam Puddifoot's Tea Shop!

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.