Supplier Portal Registration Guide: Purchase Order Suppliers

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 CUMarketplace@cu.edu:

University of Colorado

Supplier Invitation for University of Colorado

Dear Madam Puddifoot's Tea Shop,

The University of Colorado (CU) has invited you, , 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 Puddifoot's Tea Shop. However, the CU Supplier Portal offers additional benefits, such as:

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

Becoming a University of Colorado 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

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 Puddifoot's Tea Shop
- 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.

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.

University of Colorado

Boulder | Colorado Springs | Denver | Anschutz Medical Campus

Supplier Registration

This is the only way for you to access and update your supplier account information.

Contact Information

First Name *

Last Name *

Title

Phone Number * ext.

For international numbers, begin the number with +

Login Information

Email *

Confirm Email *

Create Password *

Confirm Password *

Security Information

Select your Security Question and enter an answer. This information will be used in the future if you forget your password.

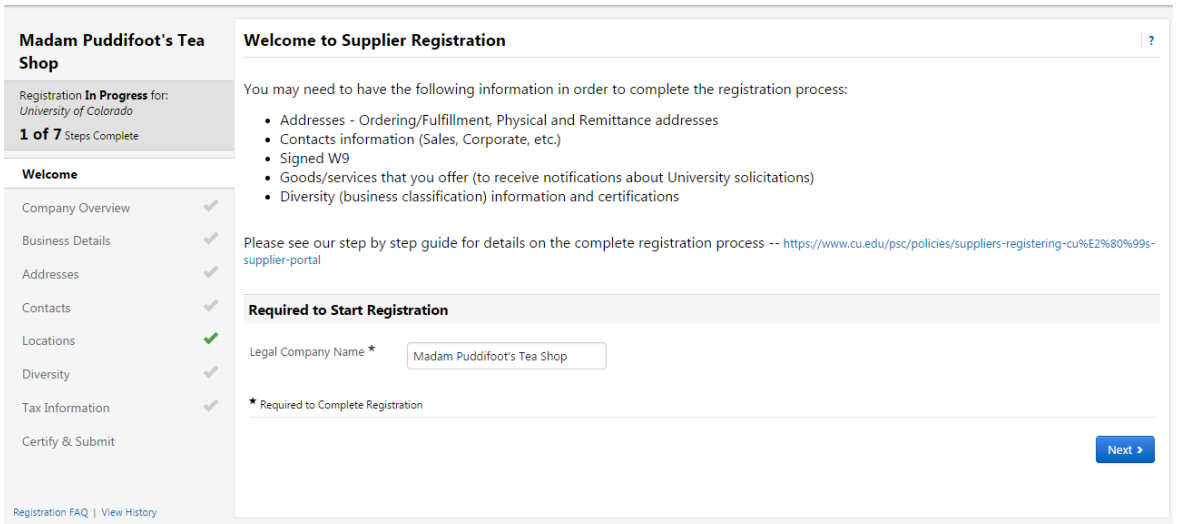
Question *

* Required to Create Account

Create Account

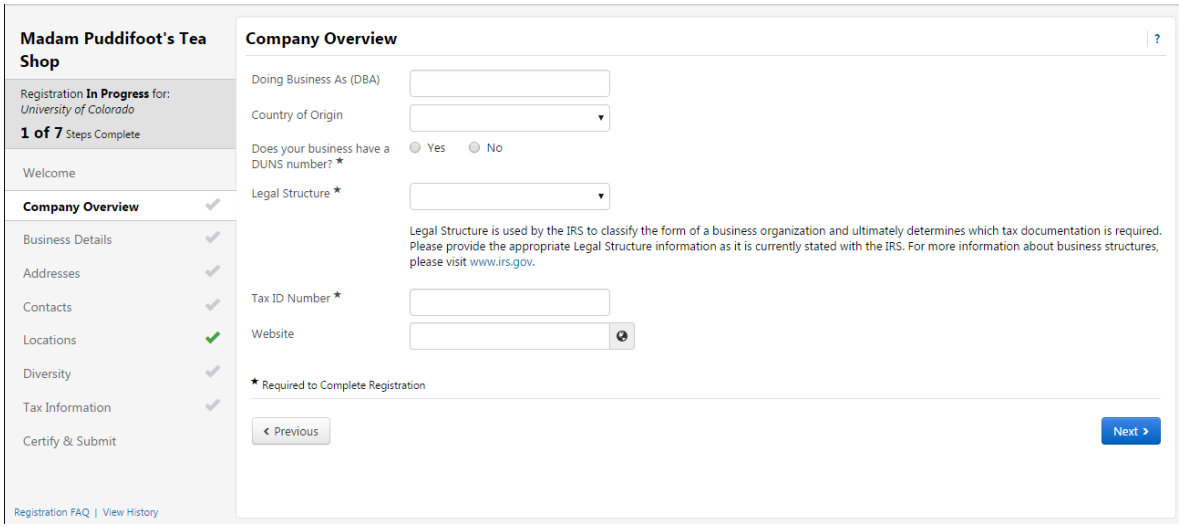
Complete all fields that have the star symbol next to them and click Create Account

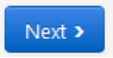
Welcome



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

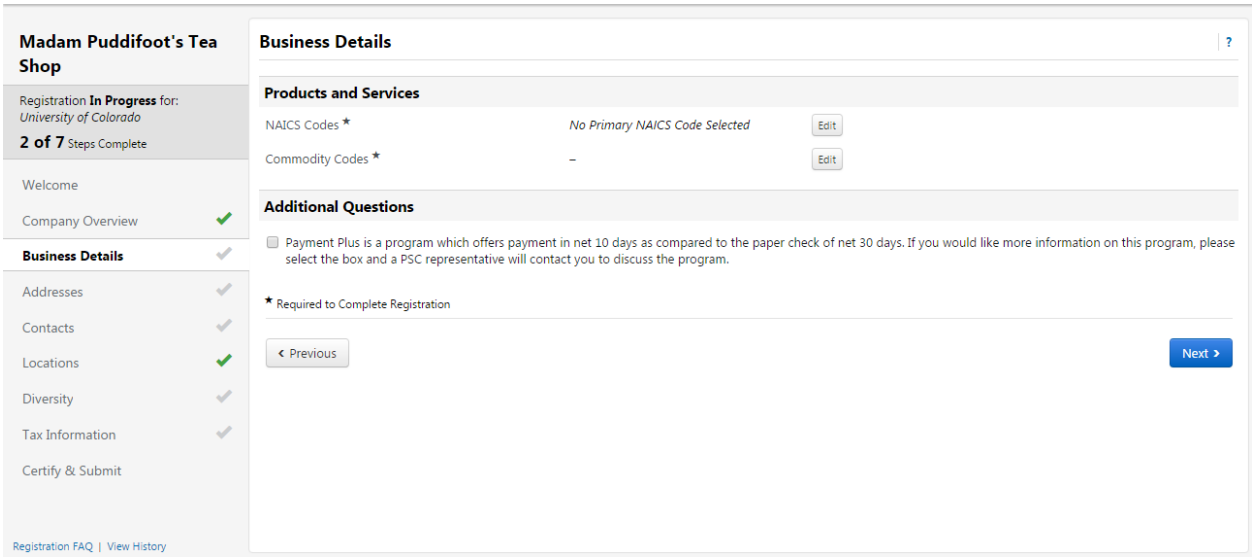
Company Overview



This is the page where you can add you 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 

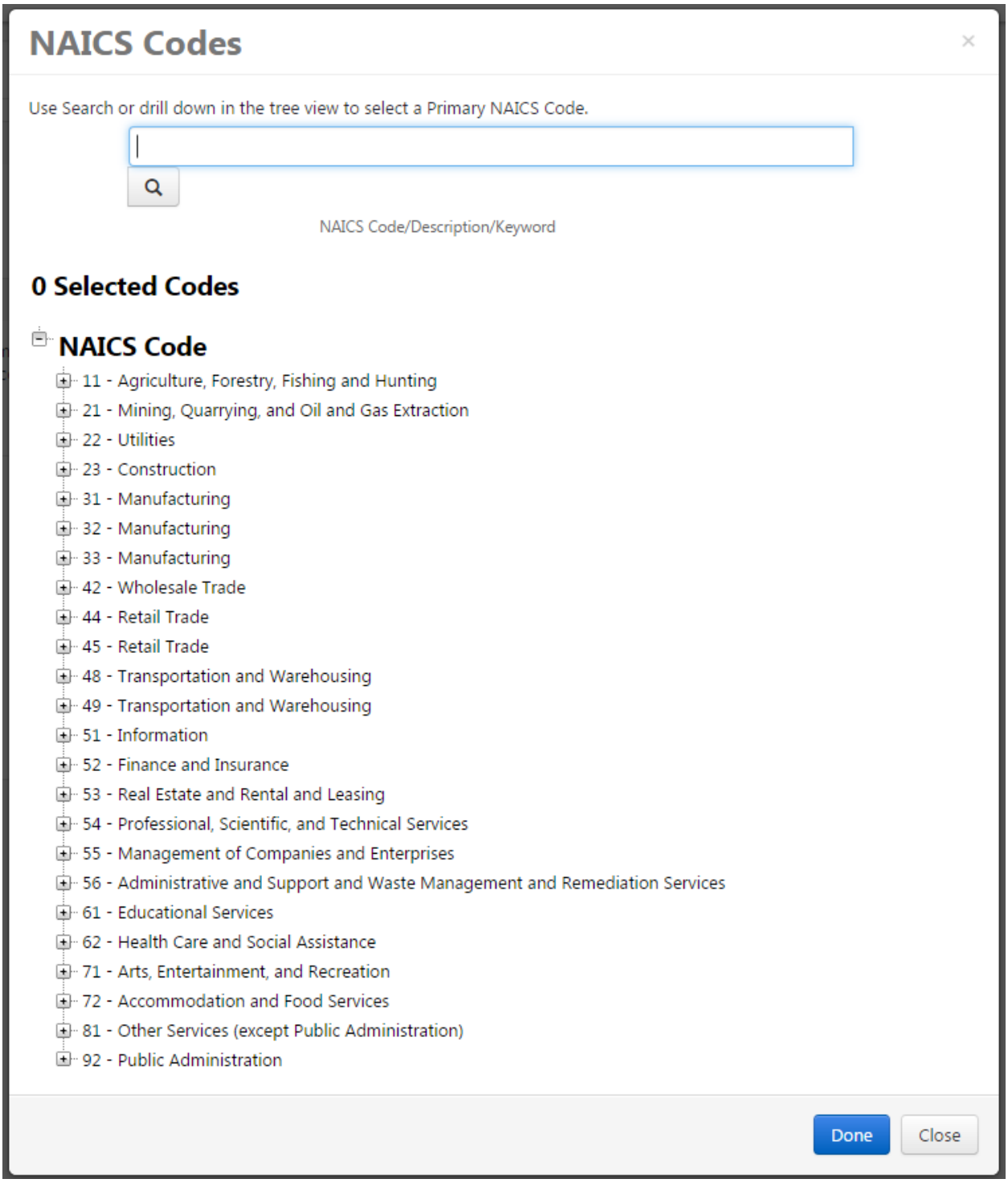
Business Details

This is where you will provide your NAICS and commodity codes. This information helps us to invite appropriate suppliers to solicitation events as well as report on types of goods/services purchased.

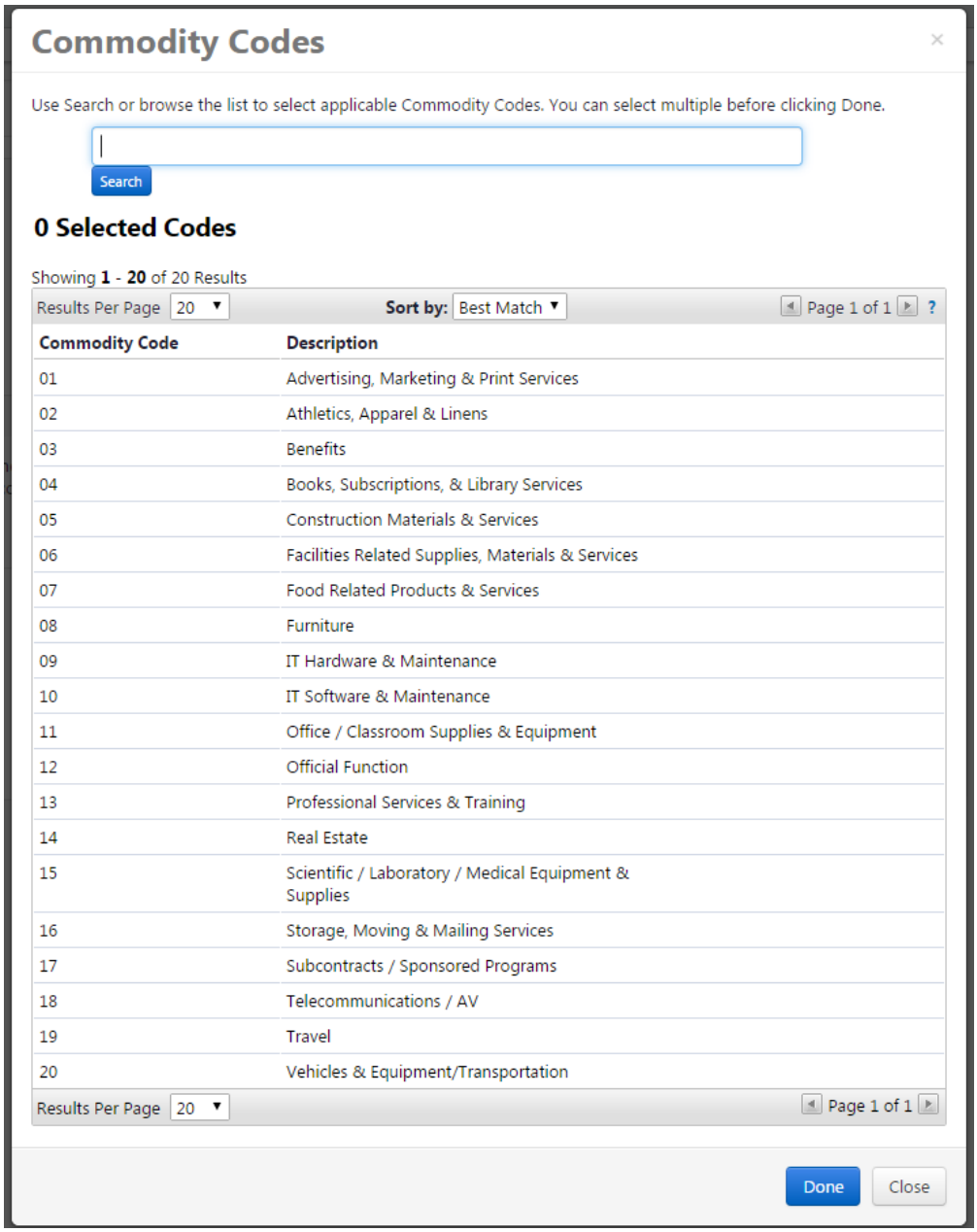


We recommend using the search feature to determine your **NAICS** code. Enter text related to the type of business you do. To get the most complete list of available options enter just 1 keyword related to the kind of business.

- **EXAMPLE**: by Entering the word “Drywall” in the search 2 options appear –
  - 238310 Drywall and Insulation Contractors
  - 423320 Brick, Stone, and Related Construction Material Merchant Wholesalers
- The expandable tree is also available to help determine the primary type of work.



The commodity code list is a shortened/condensed version of codes used internally by CU. There are only 20 selections, but you can select more than one.



Commodity Codes

Use Search or browse the list to select applicable Commodity Codes. You can select multiple before clicking Done.

Search

0 Selected Codes

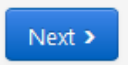
Showing **1** - **20** of 20 Results

Results Per Page 20 **Sort by:** Best Match 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

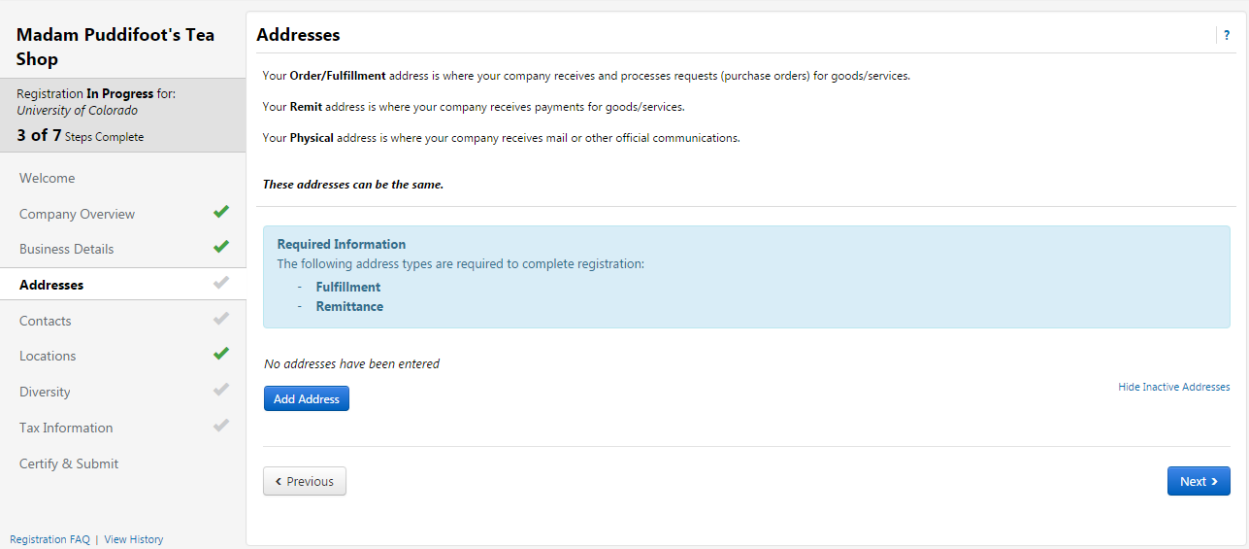
Results Per Page 20 Page 1 of 1

Done Close

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

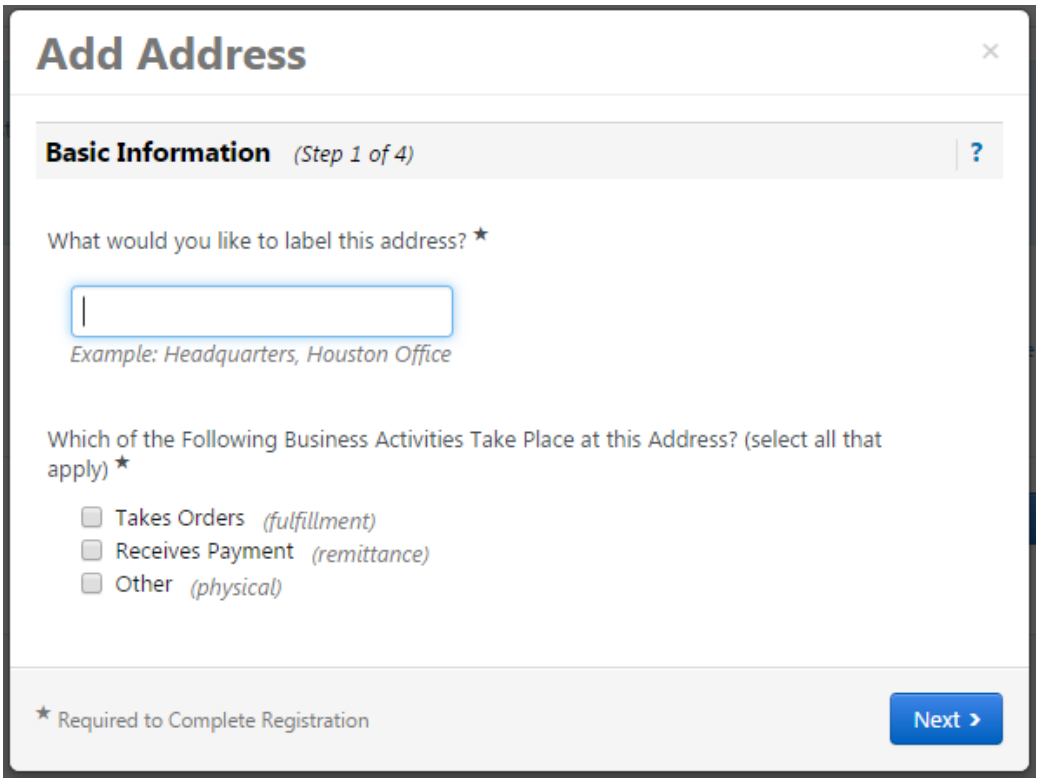
Addresses

You will need to enter fulfillment, physical, 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

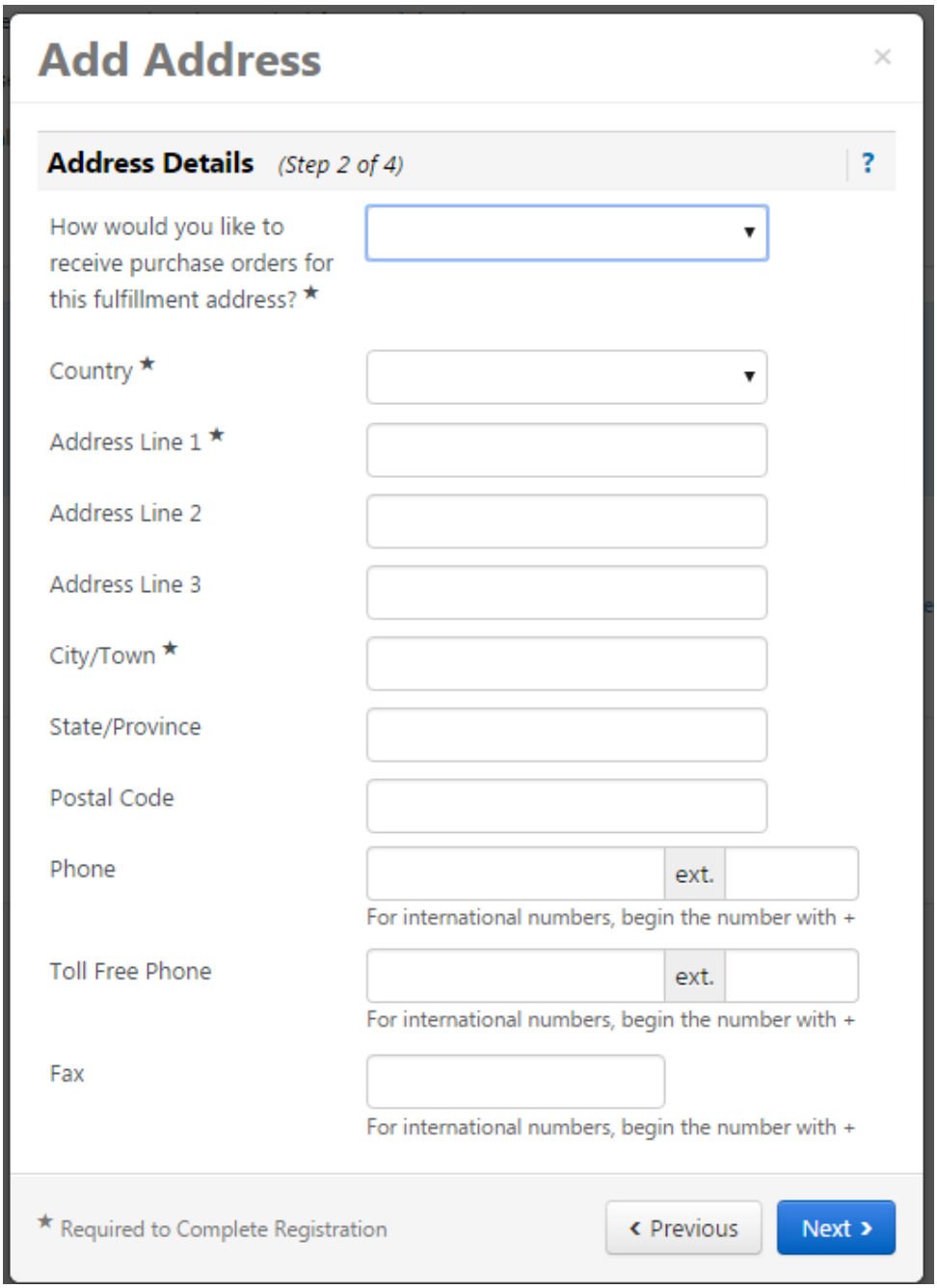


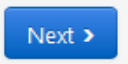
Click on the

button. Anything can be entered for the address label. Check all address types that apply to the address you will be entering and click

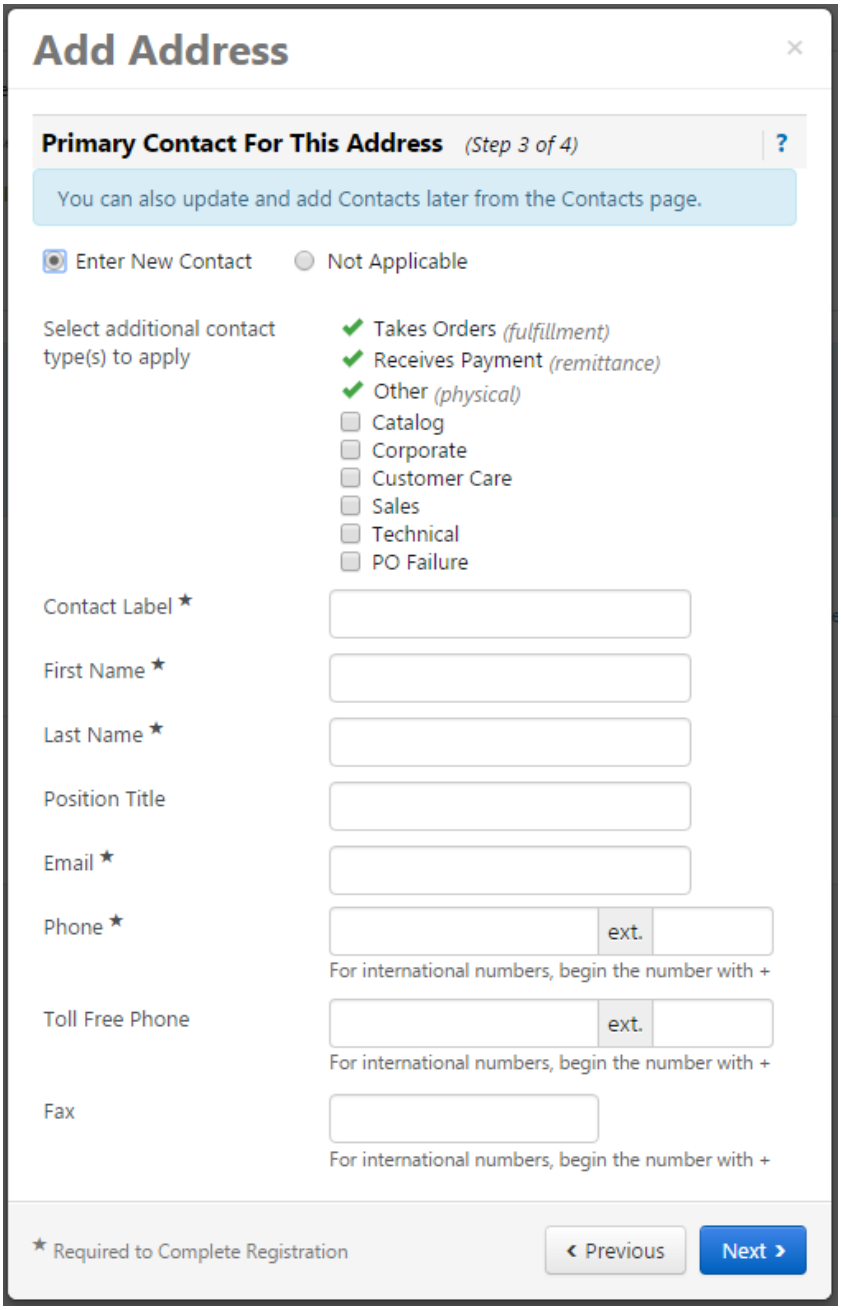


If the entry is for fulfillment, you will need to enter an email or fax number where POs can be sent. The remit to address is where payment will be sent and should match the address on the invoice you will be submitting.

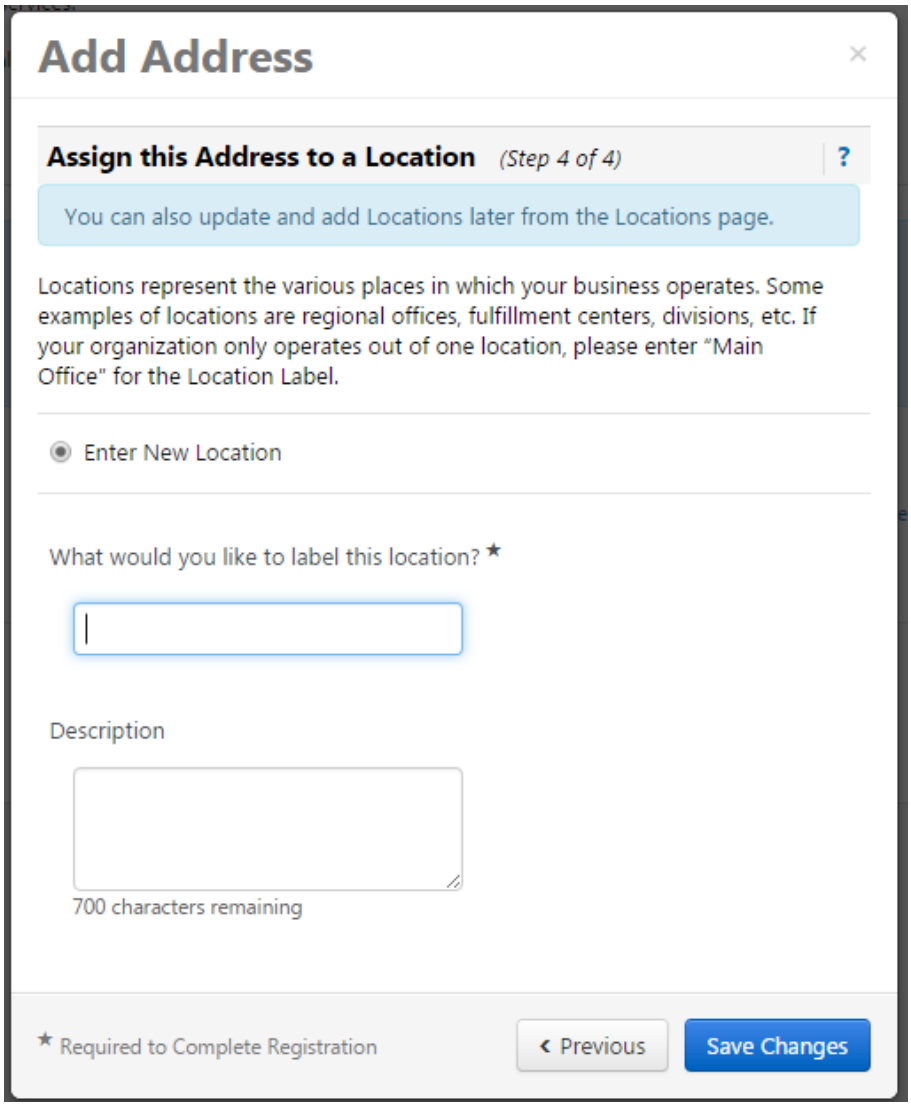


Fill out all the required information and click 

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.



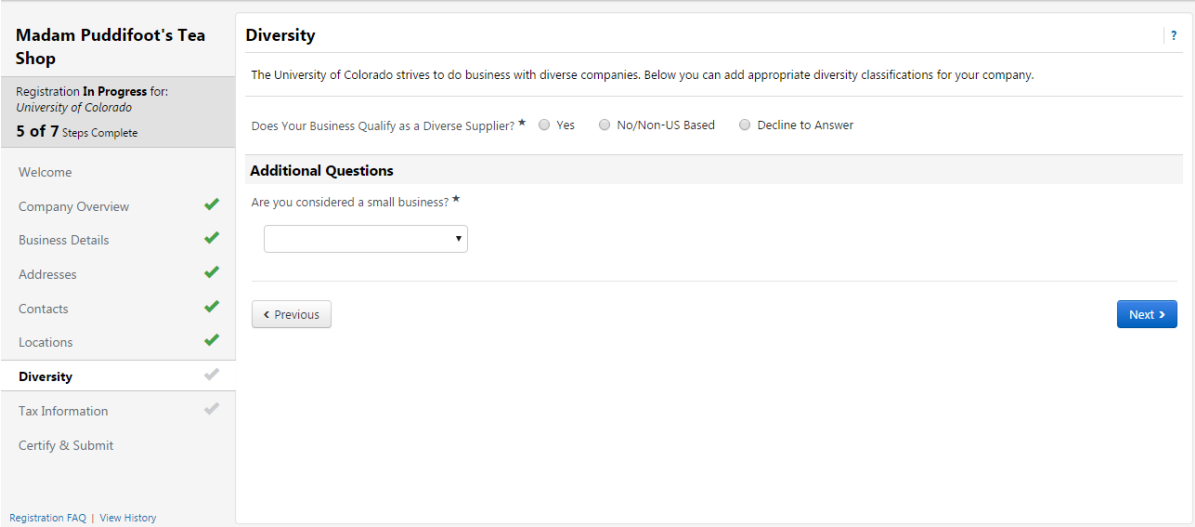
You will then be asked to assign a location for this address. This is a requirement for CU so that departments can build POs and payments can be made to you. The location label should be a description of the address and can be the same as the address label.



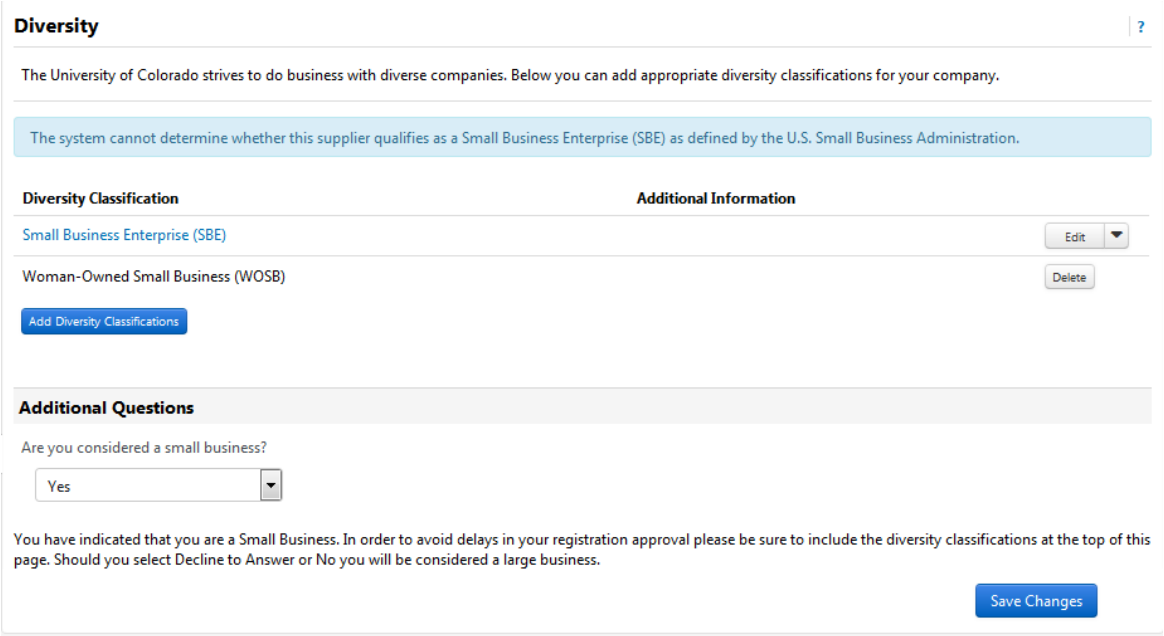
Click Save Changes

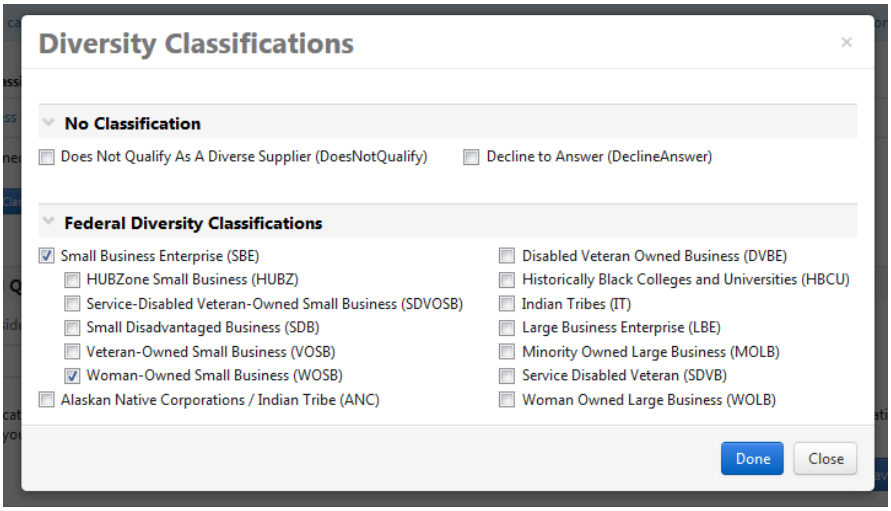
Diversity

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

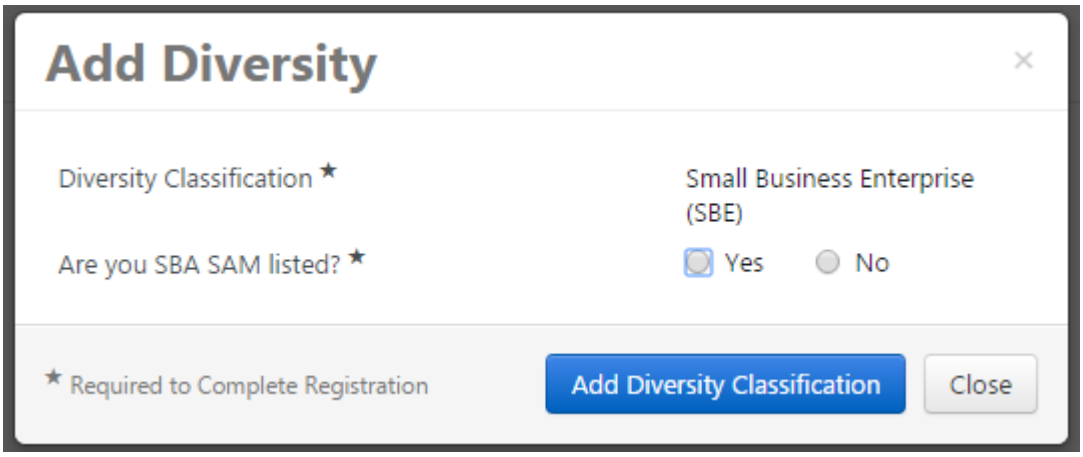


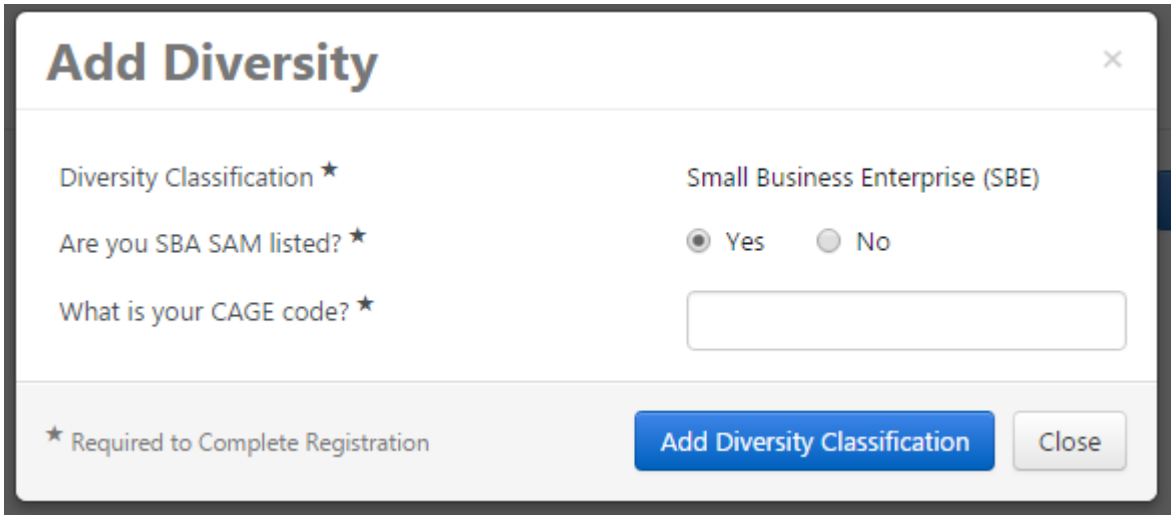
If you state that you are a diverse business, you will be asked to add a diversity classification.





If you choose “Small Business Enterprise”, a new box will appear asking if you are SBA SAM listed and what your CAGE code is. If you do not have a CAGE code, please choose no for the SBA SAM question.



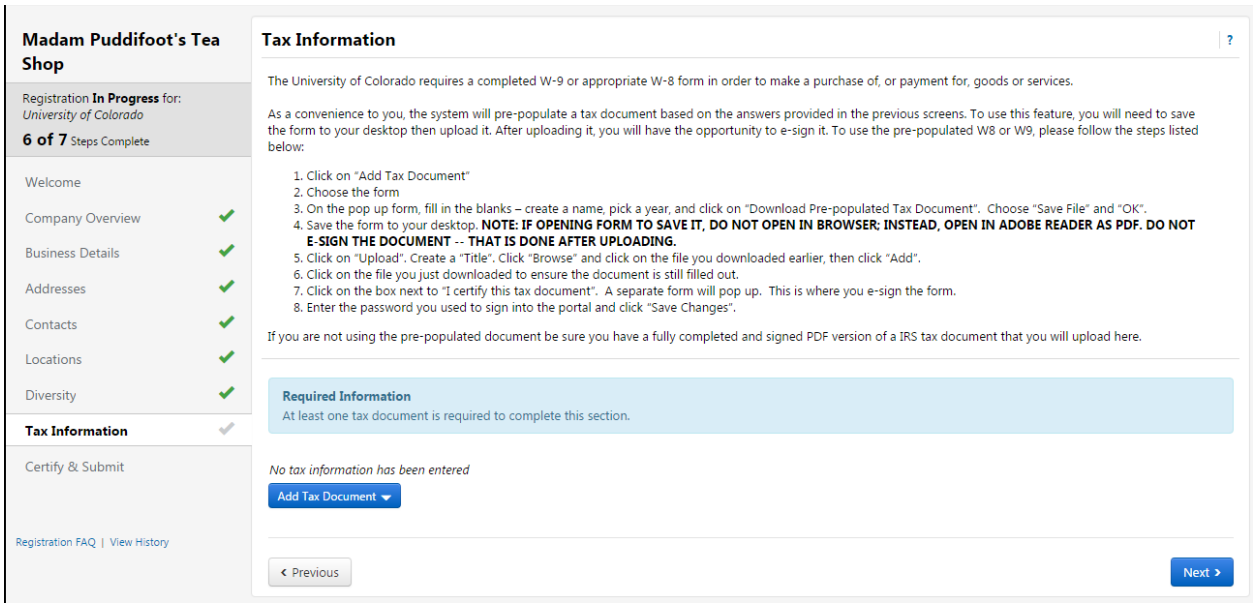


You will also have the option of adding more diversity classifications.

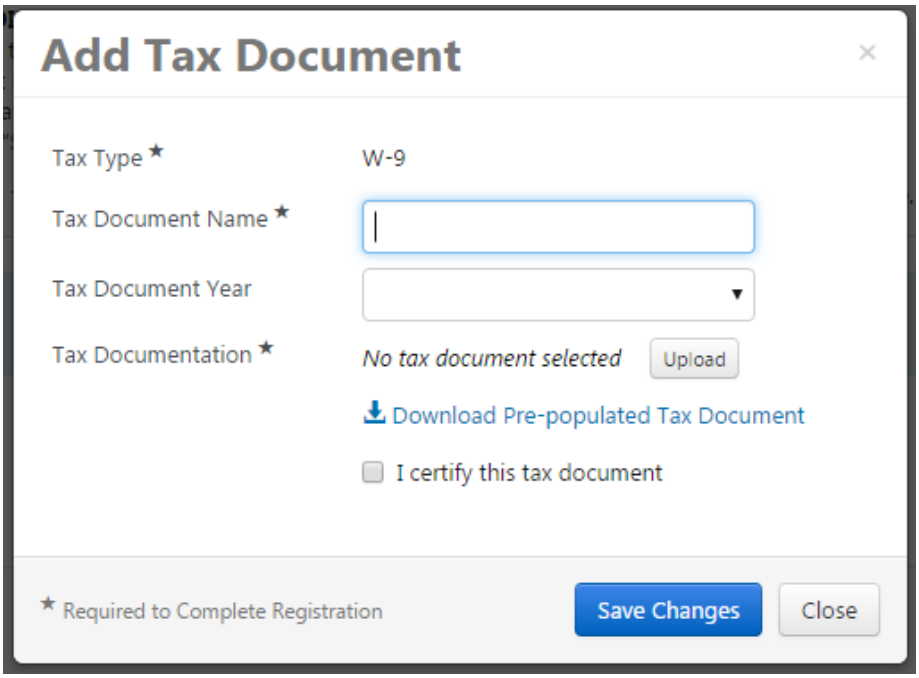
Once you have provided your diversity information, click

Tax Information

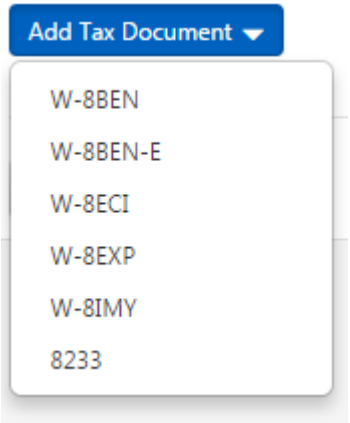
Here you will be required to upload your tax document. There are a few ways this can be accomplished. The first is to use the pre-populated document, which has been completed by the system based on your previous answers.



If you choose to use this method, click the Add Tax Document button and use the Download Pre-populated Tax Document link.



International suppliers will be shown a list of W8s to choose from. If you have questions about which form to use, please refer to the IRS website: http://www.irs.gov/forms-pubs/about-form-w8



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.
Madam Puddifoot's Tea Shop

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.)
1800 Leprosy Lane 1800 Leprosy Lane

Requester's name and address (optional)

6 City, state, and ZIP code
Denver, CO 80203

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
☐☐☐ – ☐☐ – ☐☐☐☐

or

Employer identification number
1 5 – 4 9 6 7 8 9 4

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.

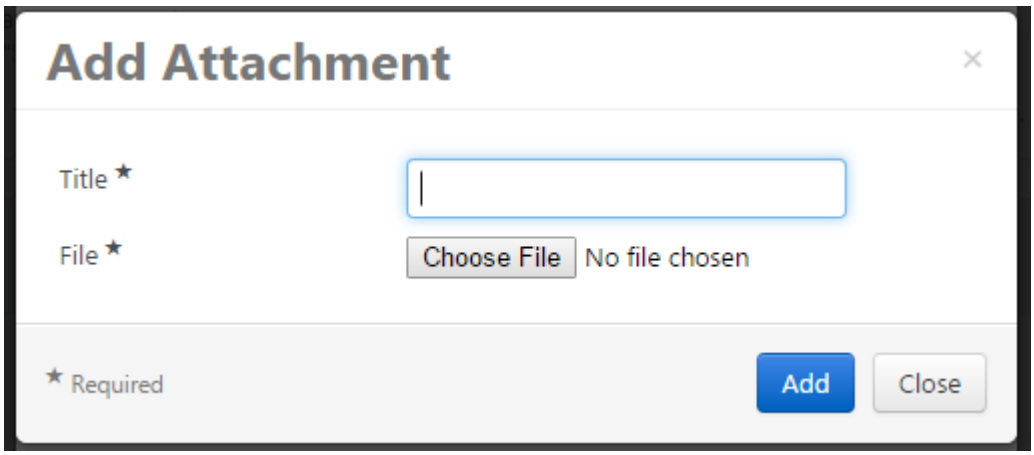
By signing the filled-out form, you:

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.

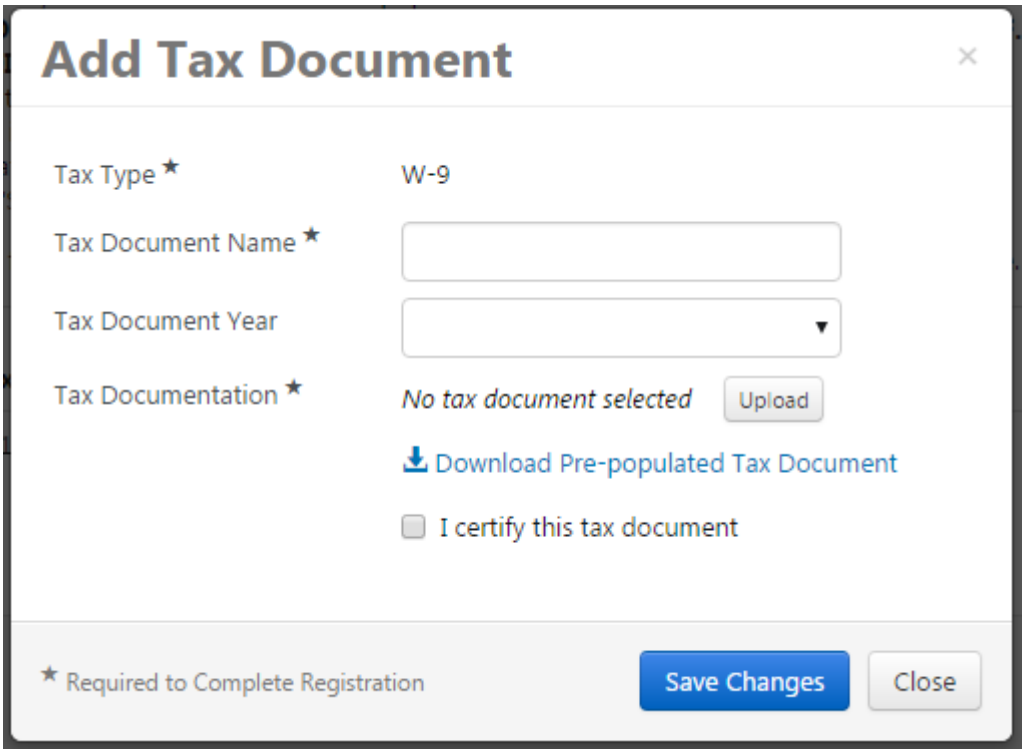
***Note for foreign entities: If you have questions about which document to choose, please contact our international tax specialists at alicia.dandeneau@cu.edu or kendra.zafiratos@cu.edu.**

Go back to the Add Tax Document window and click the Upload button.

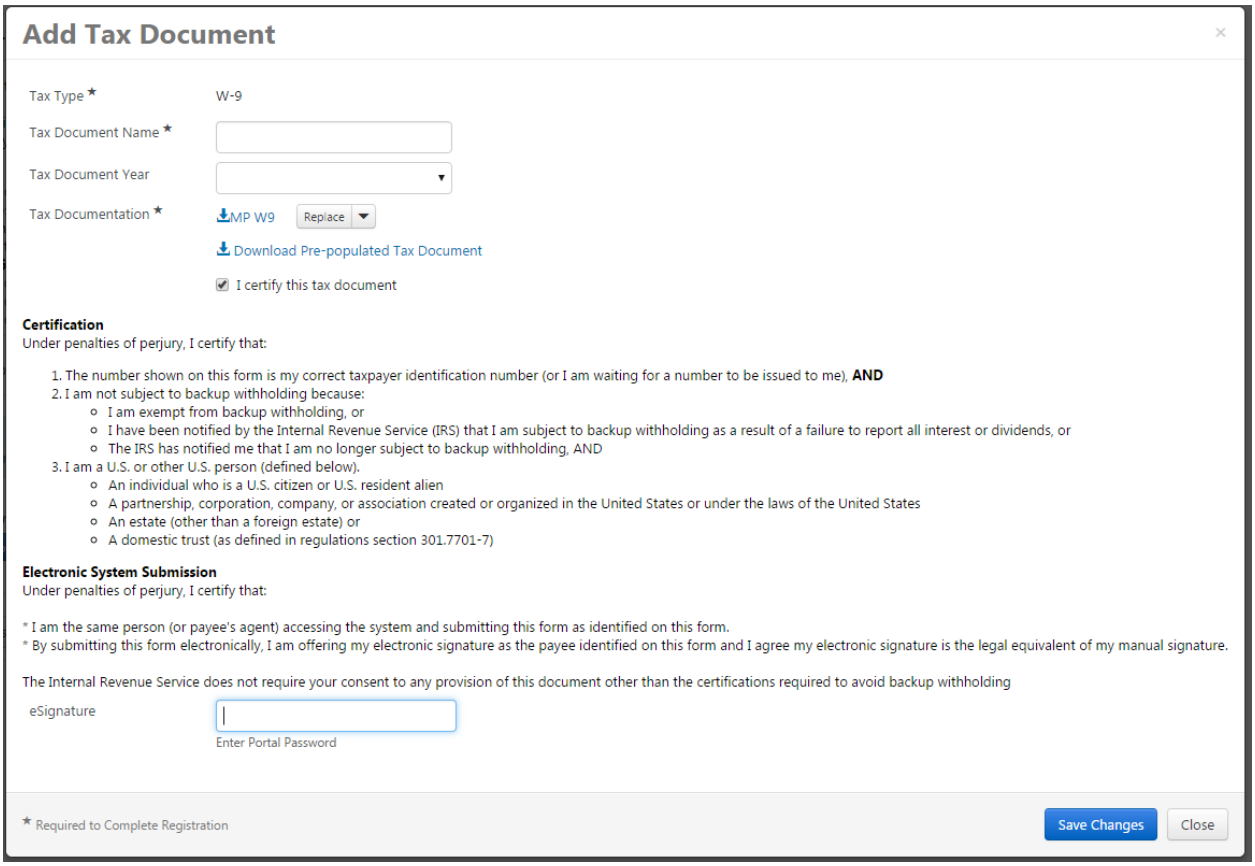
A new window will pop up asking you to add an attachment. Name the document and click Choose File



Select the form you just saved to your desktop and check the I certify this tax document box.



You will then need to e-sign your tax document, which is done by entering your portal password in the e-signature box. This is the same password you used to log into the portal.



Add Tax Document

Tax Type * W-9

Tax Document Name *

Tax Document Year

Tax Documentation * MP W9 Replace

Download Pre-populated Tax Document

I certify this tax document

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:
   - I am exempt from backup withholding, or
   - I have 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
   - The IRS has notified me that I am no longer subject to backup withholding, AND
3. I am a U.S. or other U.S. person (defined below).
   - An individual who is a U.S. citizen or U.S. resident alien
   - A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States
   - An estate (other than a foreign estate) or
   - A domestic trust (as defined in regulations section 301.7701-7)

Electronic System Submission
Under penalties of perjury, I certify that:

* I am the same person (or payee's agent) accessing the system and submitting this form as identified on this form.
* By submitting this form electronically, I am offering my electronic signature as the payee identified on this form and I agree my electronic signature is the legal equivalent of my manual signature.

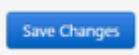
The Internal Revenue Service does not require your consent to any provision of this document other than the certifications required to avoid backup withholding

eSignature

Enter Portal Password

* Required to Complete Registration

Save Changes Close

Click 

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:

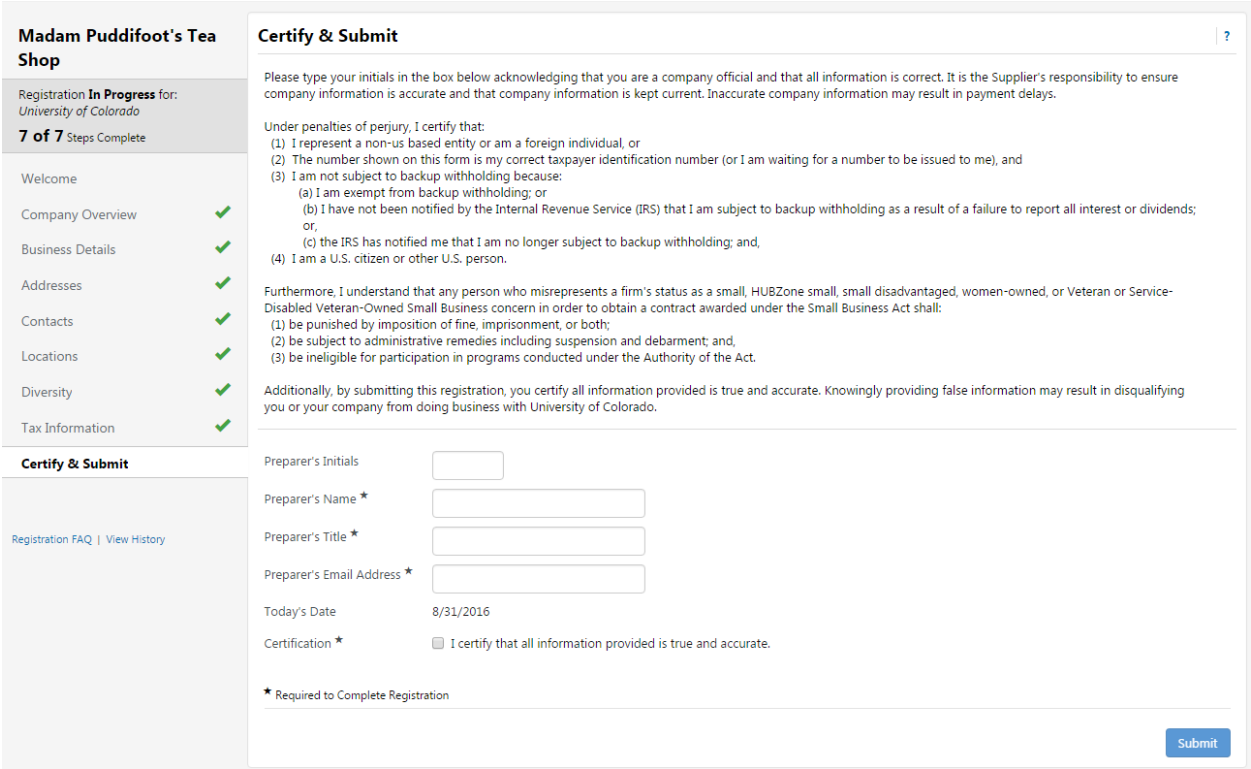
1800 Grant Street

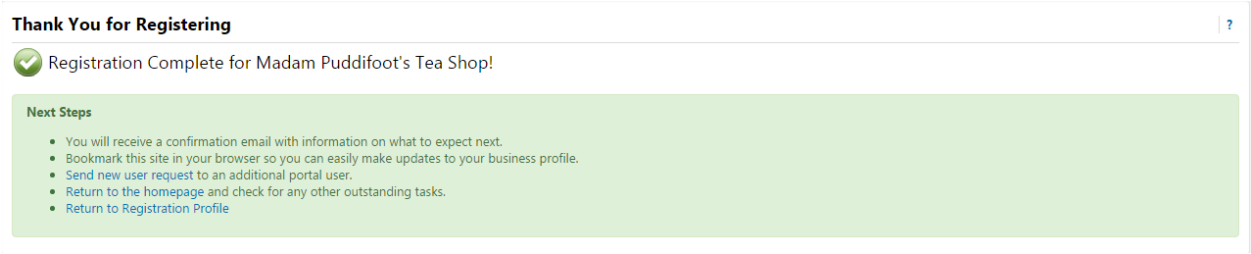
Suite 500

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





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.