

# Supplier Onboarding – Domestic Company

Indiana University (IU) is a member of the Jaggaer supplier network. To receive payment from IU, payees, referred to as “suppliers” in Jaggaer, must complete the supplier onboarding process and join the network. Once established, your supplier portal is used to manage payment information, addresses, tax forms, and more.

The Jaggaer portal is not accessible on mobile devices such as smartphones or tablets.  
It must be accessed from a desktop computer.

This document provides a step-by-step walkthrough of the supplier onboarding process for a US-taxed Company.

Before you follow the steps in this document, locate the following items:

- Indiana University supplier invitation email.
- Direct deposit (ACH) banking information.
- Scanned image of completed and signed W-9 tax form.

Already started the process and need to pick up where you left off? [Click here.](#)

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## Invitation

The onboarding process begins when an IU staff member requests your addition to the supplier network. IU Purchasing reviews the request, and, once approved, invites you to begin the onboarding process via email. This email invitation will come from the email address [buyiu.noreply@iu.edu](mailto:buyiu.noreply@iu.edu), have a sender name of "Indiana University," and will look like the example below.

Click **Register Now** to establish your username and password.

 Indiana U TEST Site <buyiu.noreply@iu.edu>  
To

ⓘ If there are problems with how this message is displayed, click here to view it in a web browser.

[↩ Reply](#) | [↩ Reply All](#) | [→ Forward](#) |  | [⋮](#)

Wed 8/24/2022 10:35 AM



### Supplier Invitation for Indiana University

Dear The Sampson Project,

A staff member at Indiana University has requested your addition to the IU supplier network. IU uses Jaggaer, a best-in-class procure-to-pay system. To join our network and do business with IU, you must establish your identity in our supplier portal. In this portal, you will be prompted to enter information such as tax forms and payment details.

**Important:** Indiana University uses Purchase Orders for securing goods and services. For all purchases, an invoice must be submitted with the Indiana University PO Number included before payment will be issued.

To get started, click the "Register Now" button below.

[Register Now](#)

You can learn more about the onboarding process by reviewing our [New Supplier Registration video](#) which provides an overview of the process. Additional resources are available on our [For Suppliers page](#).

If you have any questions please contact the Supplier Data Management Team using our [support form](#).

We look forward to working with you!

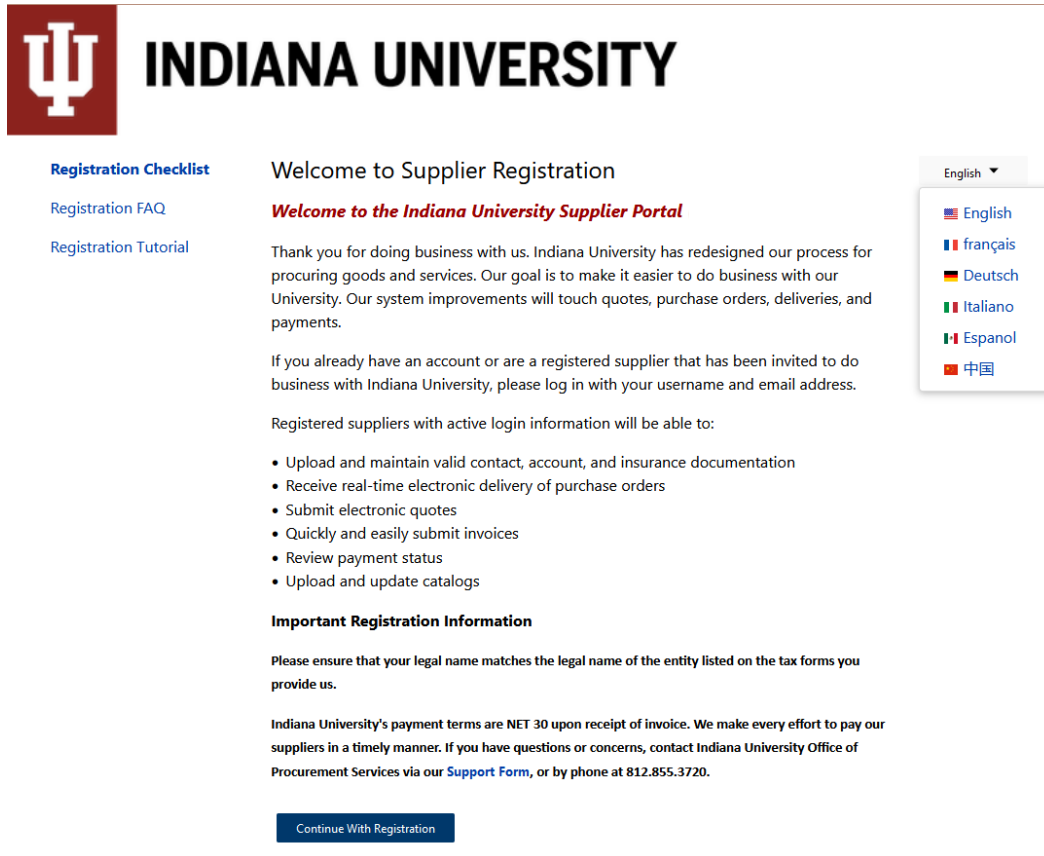
Thank you.

You will also receive reminder emails from Jaggaer directly. These messages come from [support@sciquest.com](mailto:support@sciquest.com) and contain contact information for Jaggaer's support team.

***Please contact the IU department you are working with for assistance first before contacting Jaggaer.***

## Create Your Jaggaer Network Account

After clicking Register Now in the email invitation, the registration page opens in a browser window. Click the drop-down in the upper right-hand corner to select a language, if desired, then **Continue with Registration** to proceed.



**Ψ INDIANA UNIVERSITY**

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

**Welcome to Supplier Registration**  
**Welcome to the Indiana University Supplier Portal**

Thank you for doing business with us. Indiana University has redesigned our process for procuring goods and services. Our goal is to make it easier to do business with our University. Our system improvements will touch quotes, purchase orders, deliveries, and payments.

If you already have an account or are a registered supplier that has been invited to do business with Indiana University, please log in with your username and email address.

Registered suppliers with active login information will be able to:

- Upload and maintain valid contact, account, and insurance documentation
- Receive real-time electronic delivery of purchase orders
- Submit electronic quotes
- Quickly and easily submit invoices
- Review payment status
- Upload and update catalogs

**Important Registration Information**

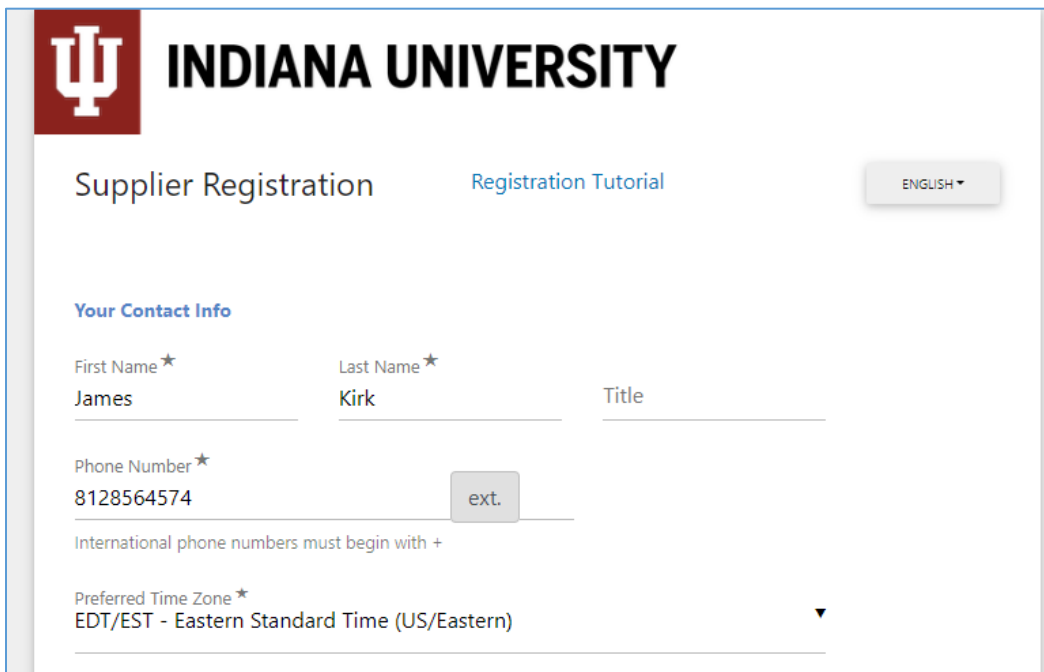
Please ensure that your legal name matches the legal name of the entity listed on the tax forms you provide us.

Indiana University's payment terms are NET 30 upon receipt of invoice. We make every effort to pay our suppliers in a timely manner. If you have questions or concerns, contact Indiana University Office of Procurement Services via our [Support Form](#), or by phone at 812.855.3720.

[Continue With Registration](#)

English ▾  
 English  
 français  
 Deutsch  
 Italiano  
 Español  
 中国

Fields marked with a star are required. Verify your first and last name and enter your phone number in the appropriate field. Update your time zone if needed.



**Ψ INDIANA UNIVERSITY**

Supplier Registration [Registration Tutorial](#) ENGLISH ▾

**Your Contact Info**

First Name ★  Last Name ★  Title

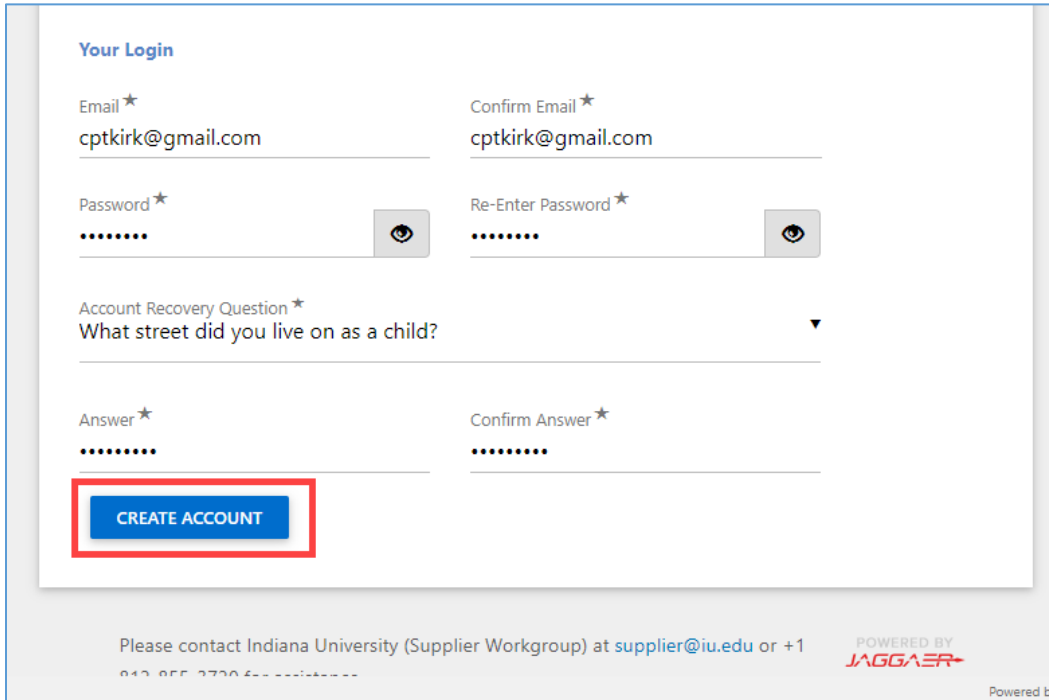
Phone Number ★    
 International phone numbers must begin with +

Preferred Time Zone ★

Proceed to the **Your Login** section of the page. Confirm your email address and establish a password.

Your email address acts as your username when accessing the supplier portal. Store your username and password in a safe place! You will need this information to login to the portal and make changes in the future.

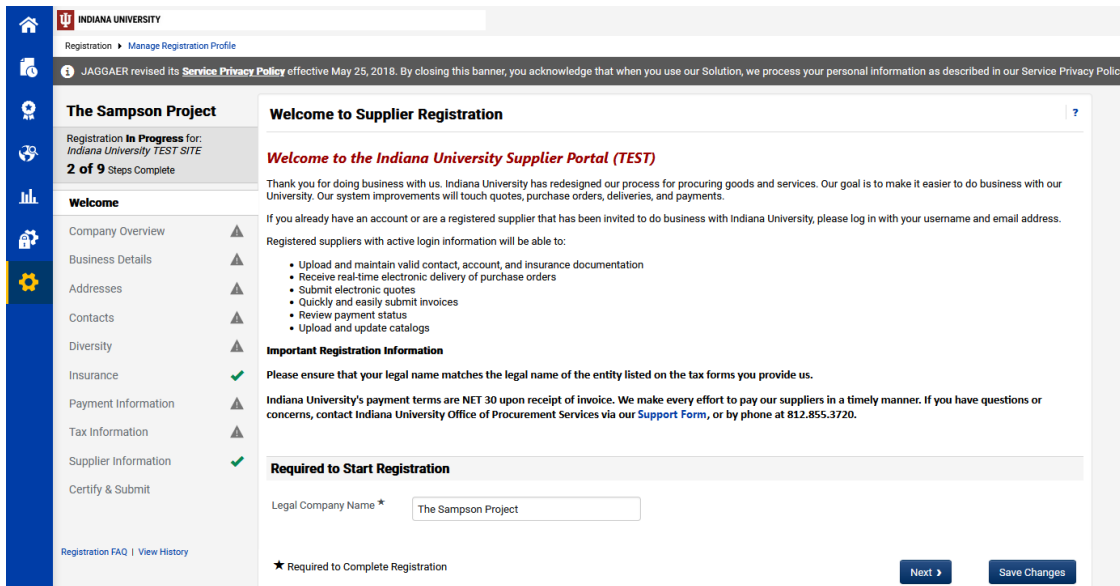
Answer the Account Recovery Question and click **Create Account** to establish your account.



Upon creating your account you will automatically be transferred the supplier portal.

## Complete and Submit Registration Information

The supplier registration page is made up a series of sections, visible in the left-hand menu. Each section is followed by a checkmark. Completed sections are represented by green checkmarks. Sections with gray checkmarks require additional information.

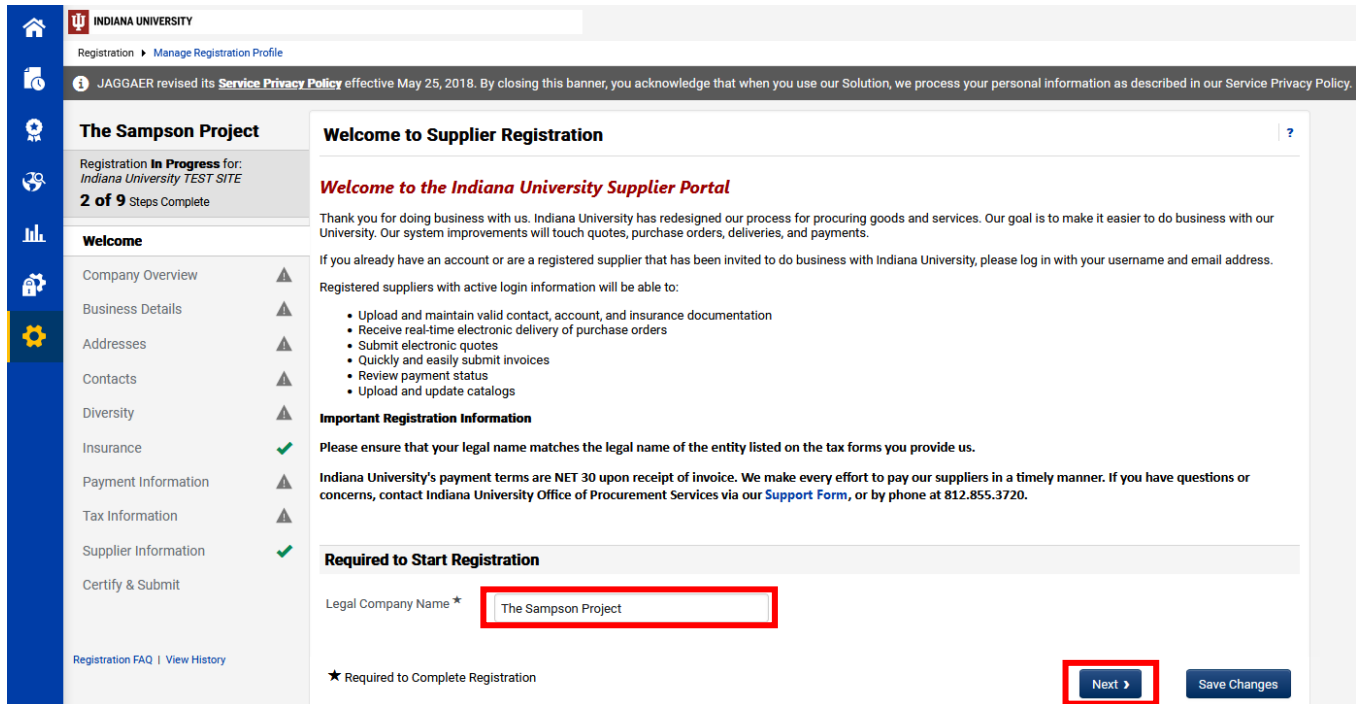


Throughout the registration process you will see fields marked with a star.

These fields are required and must be satisfied to complete your registration. All other fields are optional.

## Welcome

On the Welcome page, enter the company name in the appropriate fields then click **Next**.



The screenshot shows the 'Welcome to Supplier Registration' page. On the left is a sidebar with navigation items: Home, Registration (Manage Registration Profile), The Sampson Project (Registration In Progress for Indiana University TEST SITE, 2 of 9 Steps Complete), Welcome, Company Overview, Business Details, Addresses, Contacts, Diversity, Insurance, Payment Information, Tax Information, Supplier Information, and Certify & Submit. The main content area has a header 'Welcome to Supplier Registration' and a sub-header 'Welcome to the Indiana University Supplier Portal'. Below this is a list of benefits for registered suppliers and a section for 'Important Registration Information' which states that the legal name must match the tax forms. The 'Required to Start Registration' section contains a text input field for 'Legal Company Name' with the value 'The Sampson Project'. A 'Next' button is highlighted with a red box, and a 'Save Changes' button is also visible.

You are not required to complete the supplier onboarding process in one sitting. At any time, click **Save Progress** to save your work and return later.

## Company Overview

In the Company Overview section, fill in the **Country of Origin, DUNS number (if applicable), Legal Structure, Tax ID Number, and Legal Structure Sub-Classification.**

## Company Overview

Watch this video for help: [link here](#)

The information entered on this page allows us to track general information about your company to ensure we have the most up-to-date information in our system.

Please provide all of your DBAs. If you have multiple DBAs, please separate them with semicolons.

Doing Business As (DBA)

**Country of Origin** should be the country you use for *tax purposes*. (US Citizens and Permanent Residents should select "United States")

Country of Origin \*

Does your business have a DUNS number? \*  Yes  No

Legal Structure \*

If you are registering as an individual please provide your social security number here or equivalent if you reside outside of the United States.

Tax ID Number

Website

**Additional Questions**

Legal Structure Sub-Classification \*

★ Required to Complete Registration

[Previous](#) [Next](#) [Save Changes](#)

Next, select your legal structure from the **Legal Structure** drop-down menu.

Enter your Employee Identification Number in the **Tax ID Number** field. Click **Save Changes** to save your work and **Next** to complete the Individual Overview section.

The left-hand menu updates to reflect a green checkmark once the section is complete.

INDIANA UNIVERSITY

Registration > Manage Registration Profile

**The Sampson Project**

Registration **In Progress** for: Indiana University TEST SITE  
3 of 9 Steps Complete

Welcome

**Company Overview** ✓

Business Details ▲

Addresses ▲

Contacts ▲

Diversity ▲

Insurance ✓

Payment Information ▲

Tax Information ▲

Supplier Information ✓

Certify & Submit

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

**Company Overview**

Watch this video for help: [link here](#)

The information entered on this page allows us to track general information about your company to ensure we have the most up-to-date information in our system.

Please provide all of your DBAs. If you have multiple DBAs, please separate them with semicolons.

Doing Business As (DBA)

**Country of Origin** should be the country you use for *tax purposes*. (US Citizens and Permanent Residents should select "United States")

Country of Origin \*

Does your business have a DUNS number? \*  Yes  No

Legal Structure \*

If you are registering as an individual please provide your social security number here or equivalent if you reside outside of the United States.

Tax ID Number

Website

**Additional Questions**

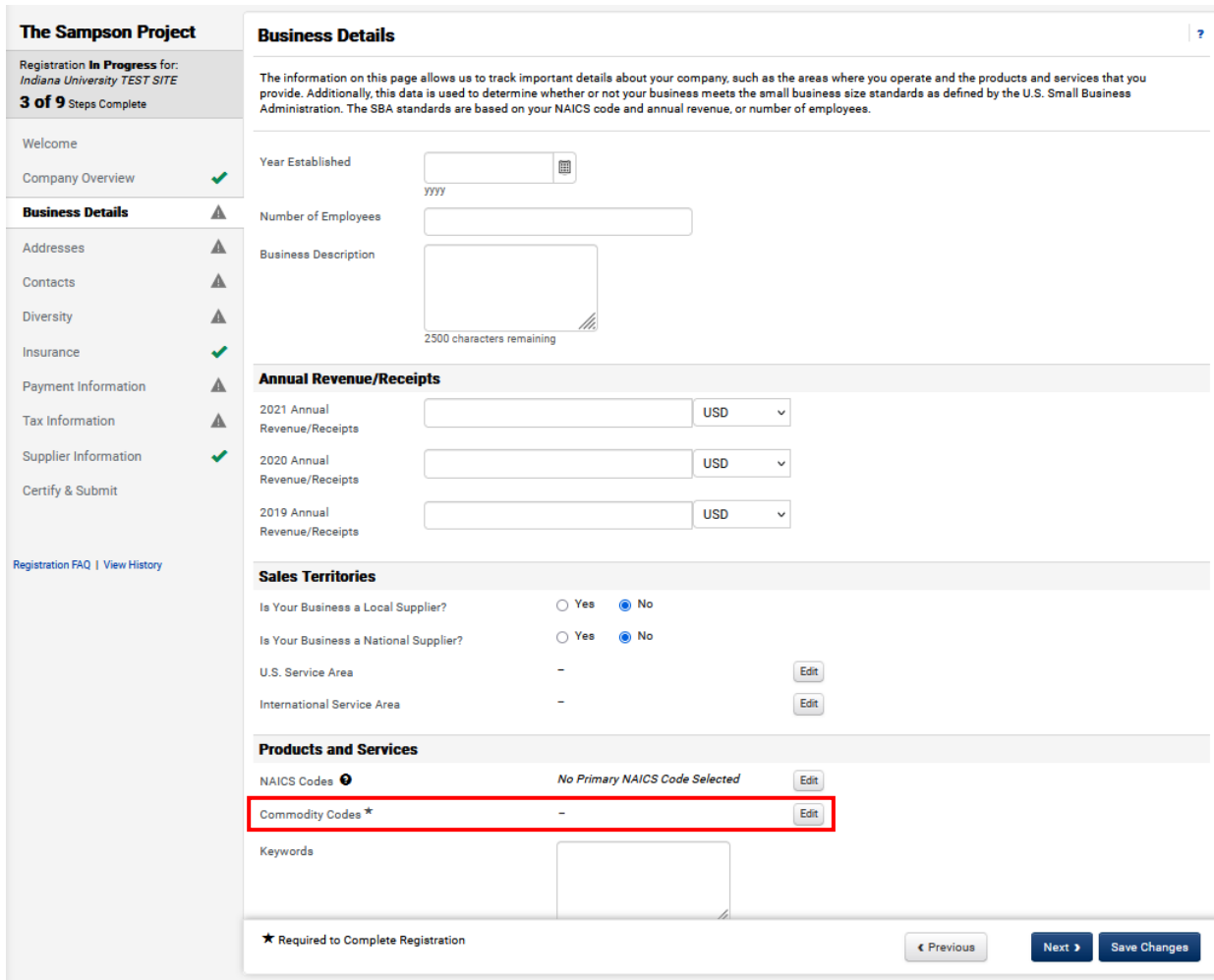
Legal Structure Sub-Classification \*

★ Required to Complete Registration

[Previous](#) [Next](#) [Save Changes](#)

Business Details

This area is mainly comprised of optional information about the company. The only required information is **Commodity Codes**.



**The Sampson Project**

Registration **In Progress** for:  
 Indiana University TEST SITE  
**3 of 9** Steps Complete

Welcome

Company Overview ✓

**Business Details** ▲

Addresses ▲

Contacts ▲

Diversity ▲

Insurance ✓

Payment Information ▲

Tax Information ▲

Supplier Information ✓

Certify & Submit

Registration FAQ | View History

**Business Details** ?

The information on this page allows us to track important details about your company, such as the areas where you operate and the products and services that you provide. Additionally, this data is used to determine whether or not your business meets the small business size standards as defined by the U.S. Small Business Administration. The SBA standards are based on your NAICS code and annual revenue, or number of employees.

Year Established

Number of Employees

Business Description

**Annual Revenue/Receipts**

2021 Annual Revenue/Receipts  USD ▼

2020 Annual Revenue/Receipts  USD ▼

2019 Annual Revenue/Receipts  USD ▼

**Sales Territories**

Is Your Business a Local Supplier?  Yes  No

Is Your Business a National Supplier?  Yes  No

U.S. Service Area -

International Service Area -

**Products and Services**

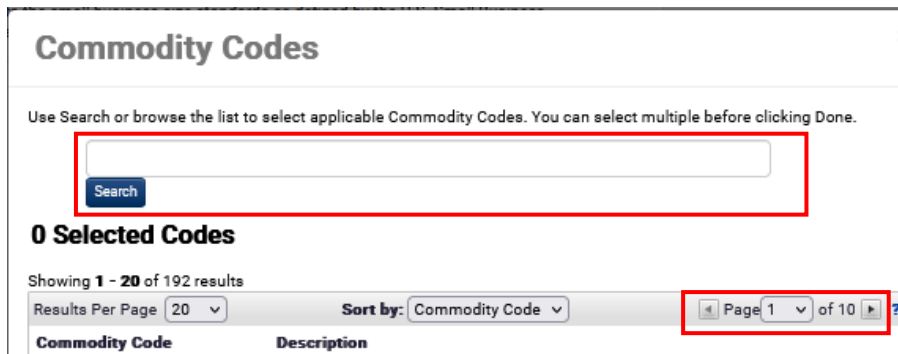
NAICS Codes ⓘ *No Primary NAICS Code Selected*

**Commodity Codes \*** -

Keywords

★ Required to Complete Registration

Click Edit. A new window will open with a search box.



**Commodity Codes** ?

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

**0 Selected Codes**

Showing 1 - 20 of 192 results

Results Per Page 20 ▼ Sort by: Commodity Code ▼  ?

Commodity Code	Description
----------------	-------------

You can search keywords to locate the company commodity area. You can also manually search through the provided list.

**Helpful Search Tip:** Use simple keywords such as “food”, “equipment”, “books”.

**Commodity Codes**

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

research

**0 Selected Codes**

Showing 1 - 5 of 5 results

Results Per Page 20 Sort by: Commodity Code Page 1 of 1

Commodity Code	Description
IT7	Computer (Hardware) - Enterprise & Research & Services
PRO22	Marketing Services, Surveys, Market Research, Student Recruitment
PRO44	Research agreements, collaboration agreements, and internally funded research agreements
SCI2	Chemicals, Gases & Elements - Research & Laboratory
SCI24	Research agreements, collaboration agreements, and internally funded research agreements

Click the commodity code that best describes your business area.

**Commodity Codes**

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

research

**1 Selected Codes**

Showing 1 - 5 of 5 results

Results Per Page 20 Sort by: Commodity Code Page 1 of 1

Commodity Code	Description
IT7	Computer (Hardware) - Enterprise & Research & Services
PRO22	Marketing Services, Surveys, Market Research, Student Recruitment
PRO44	Research agreements, collaboration agreements, and internally funded research agreements
SCI2	Chemicals, Gases & Elements - Research & Laboratory
SCI24	Research agreements, collaboration agreements, and internally funded research agreements

Click **Done** to Continue.



Your selection will populate.

**Products and Services**

NAICS Codes ⓘ No Primary NAICS Code Selected

Commodity Codes \*

Keywords PRO22 (Marketing Services, Surveys, Market Research, Student Recruitment)

700 characters remaining

---

★ Required to Complete Registration

Click **Next** to continue

## Addresses

We require three types of addresses: Fulfillment, Physical, and Remittance. If there is only one address for all of these types, it must be entered three times.

**The Sampson Project**

Registration **In Progress** for:  
*Indiana University TEST SITE*  
**4 of 9** Steps Complete

[Welcome](#)

Company Overview ✓

Business Details ✓

**Addresses** ▲

Contacts ▲

Diversity ▲

Insurance ✓

Payment Information ▲

Tax Information ▲

Supplier Information ✓

Certify & Submit

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

**Addresses** ?

Please enter any addresses from which your organization does business to help us route information and communication correctly.

Fulfillment - Where IU will send POs

Physical - a physical address, perhaps headquarters, or your Tax Address

Remittance - An address associated with where IU will send payment, perhaps the accounts receivable location

**Required Information**

The following address types are required to complete registration:

- **Fulfillment**
- **Physical**
- **Remittance**

No addresses have been entered

[Hide Inactive Addresses](#)

Click **Add Address**

A new window will appear.

Supplier Onboarding – Domestic Company

Page | 9

Last Updated: 10/2/2023

### Add Address ✕

**Basic Information** (Step 1 of 3) ?

What would you like to label this address? \*

*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 ▶

Add a title for this address. Check the corresponding boxes for this address.

Click **Next**

Reminder: fields marked with a star are required. All other fields are optional.

Complete all relevant and required fields.

This is where you indicate how you want purchase order distributed: email or fax.

### Add Address

**Address Details** (Step 2 of 3)

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

Email ▼

Email

Fax

Email Address \*

\*fd@iu.edu

### Add Address

**Address Details** (Step 2 of 3) ?

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

Email Address \*

Confirm Email \*

Country \* United States

Address Line 1 \*

Address Line 2

Address Line 3

City/Town \*

State/Province \* Indiana

Postal Code \*

Phone \*  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 Next

Click **Next**

A new screen will appear.

Enter a company contact. If you click **Not Applicable**, you will be required to enter a contact on the next screen.

### Add Address

**Primary Contact For This Address** (Step 3 of 3) ?

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 +

Fax   
International phone numbers must begin with +

\* Required to Complete Registration Previous Save Changes

Click **Save Changes**

The Address and Contact sections are now complete.

**The Sampson Project**  
 Registration **In Progress** for:  
 Indiana University *TEST SITE*  
**6 of 9** Steps Complete

- Welcome
- Company Overview ✓
- Business Details ✓
- Addresses** ✓
- Contacts ✓
- Diversity ▲
- Insurance ✓
- Payment Information ▲
- Tax Information ▲
- Supplier Information ✓
- Certify & Submit

Registration FAQ | View History

**Addresses** ?

Please enter any addresses from which your organization does business to help us route information and communication correctly.

Fulfillment - Where IU will send POs  
 Physical - a physical address, perhaps headquarters, or your Tax Address  
 Remittance - An address associated with where IU will send payment, perhaps the accounts receivable location

Address Label	Address Types	Address	
Business	Remittance (Primary) Fulfillment (Primary) Physical (Primary)	123 Main street Bloomington, Indiana, 47403 United States	<input type="button" value="Edit"/>

Show Inactive Addresses

Click **Next**

### Contacts

Contacts receive notifications related to orders established with IU. You are required to have one contact on file to satisfy this section of the registration process.

If you added a contact when adding another address this section will already be complete.

Click **Add Contact**

**Kirk, James**

Registration **In Progress** for:  
 Indiana University  
**3 of 5** Steps Complete

- Welcome
- Individual Overview ✓
- Addresses ✓
- Contacts** ✓
- Payment Information ✓
- Tax Information ✓
- Certify & Submit

Registration FAQ | View History

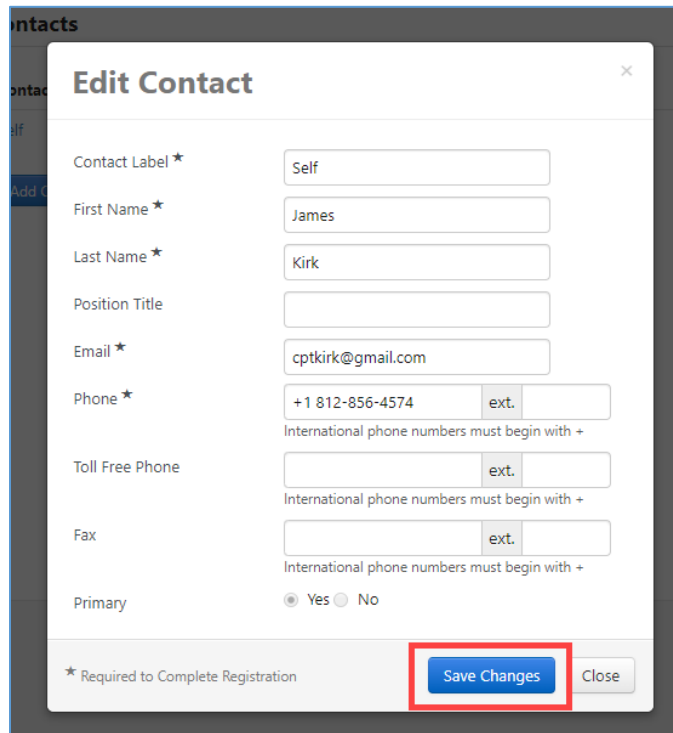
**Contacts** ?

Contact Label	Name	Email
<input type="button" value="Add Contact"/>		

Enter contact information relevant to the company.

Reminder: fields marked with a star are required. All other fields are optional.

Click **Save Changes** to save the contact to your profile.



Repeat these steps as many times as desired to add additional contacts to your profile. Click **Next** to continue to the Payment Information section.

**The Sampson Project**

Registration **In Progress** for:  
*Indiana University TEST SITE*  
**6 of 9** Steps Complete

- Welcome
- Company Overview ✓
- Business Details ✓
- Addresses ✓
- Contacts** ✓
- Diversity ⚠
- Insurance ✓
- Payment Information ⚠
- Tax Information ⚠
- Supplier Information ✓
- Certify & Submit

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

### Contacts ?

Please enter contact information for any individuals at your organization who may provide valuable information or help to our company. This will help us ensure we are always contacting the correct individual. Contacts can be linked to one existing address. Any required contact types are listed below.

Contact Label	Contact Types	Name	Email	
Administrative	Fulfillment (Primary) Remittance (Primary) Other (Primary)	Taylor, Jerry	johnsoag+sp@iu.edu	Edit <span style="font-size: 0.8em;">▼</span>

[Add Contact](#) [Show Inactive Contacts](#)

← Previous
Next >

Click **Next**

[Diversity](#)

Click **Add Diversity Classification**, even if you are not certified as a diverse supplier.

**The Sampson Project**

Registration **In Progress** for:  
 Indiana University *TEST SITE*  
**6 of 9** Steps Complete

Welcome

[Company Overview](#) ✓

Business Details ✓

Addresses ✓

Contacts ✓

**Diversity** ▲

Insurance ✓

Payment Information ▲

Tax Information ▲

Supplier Information ✓

Certify & Submit

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

**Diversity** ?

We strive to do business with diverse companies. By entering applicable diversity classifications, you will help us meet certain spending goals for our organization. A response is required. For additional explanation of all the diversity classifications listed below please visit our website at <https://www.indiana.edu/~busdiv/certification.shtml>.

**Important: Do not combine critical data documents such as SSN or Bank Information with an uploaded Diversity Certificate.**

**Refer to Indiana University's page on how to properly redact information from documents before uploading - <https://kb.iu.edu/d/adgl>.**

**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**

Do you have a designation that is not listed above?

Yes  
 No

Do you have a certifying agency not mentioned above?

Yes  
 No

A new window will appear. Select the diversity classification as it relates to the company.

Selecting a classification will require you to upload supporting documents.

**Small Business Status and Diversity Classifications** ✕

▼ **No Classification**

Does Not Qualify as a Small Business or Diverse Supplier (DoesNotQualify)

▼ **Federal Diversity Classifications**

<input type="checkbox"/> Small Business	<input type="checkbox"/> 8(a) Business Development Program (8a)
<input type="checkbox"/> HUBZone Small Business (HUBZ)	<input type="checkbox"/> Service-Disabled Veteran-Owned Small Business (SDVOSB)
<input type="checkbox"/> Small Disadvantaged Business (SDB)	<input type="checkbox"/> Veteran-Owned Small Business (VOSB)
<input type="checkbox"/> Woman-Owned Small Business (WOSB)	<input type="checkbox"/> Disabled Veteran Owned Business (DVBE)
<input type="checkbox"/> Disadvantaged Business Enterprise (DBE)	<input type="checkbox"/> Minority Business Enterprise (MBE)
<input type="checkbox"/> Service Disabled Veteran (SDVB)	<input type="checkbox"/> Veteran Owned Business (VBE)
<input type="checkbox"/> Woman Business Enterprise (WBE)	

▼ **State Diversity Classifications**

State of Indiana Minority Business Enterprise (IN-MBE)     State of Indiana Woman Business Enterprise (IN-WBE)

State of Indiana Veteran Owned Business (IN-VBE)

Click **Done**

Upload any requested documents.

Click **Next**

**Insurance**

Certain services may require liability insurance. Check with your customer if you are unsure.

If insurance is needed, click **Add Insurance** and upload supporting documents.

If insurance is not required, click **Next**

INSURANCE CARRIERS

All insurance carriers selected by supplier must be rated "A-" or above in the most recent edition of the "A.M. Best's Key Rating Guide."

**Important: Do not combine critical data documents such as SSN or Bank Information with an uploaded Insurance Certificate.**

Refer to Indiana University's page on how to properly redact information from documents before uploading - <https://kb.iu.edu/d/adgl>

No Insurance has been entered.

Add Insurance ▲

◀ Previous

Next ▶

## Payment Information

US-taxed companies may elect to receive payment via direct deposit, also known as ACH, or paper check. In either case, click **Add Payment Information** and select your preferred method of payment. Paper checks will be mailed to the remit address entered earlier in the registration process. Wire Transfer payments are reserved for foreign payments.

**The Sampson Project**

Registration **In Progress** for:  
Indiana University TEST SITE  
**7 of 9** Steps Complete

- Welcome
- Company Overview ✓
- Business Details ✓
- Addresses ✓
- Contacts ✓
- Diversity ✓
- Insurance ✓
- Payment Information** ▲
- Tax Information ▲
- Supplier Information ✓
- Certify & Submit

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

**Payment Information** ?

**IMPORTANT:** Currency on all invoices must match the currency stated on Indiana University issued purchase orders.

Information on this page is used to determine how and where you will receive payment. Please enter an email address if you wish to receive an email notification regarding payments including invoice, date, and amount.

The order of prioritization of payment methods is:

- **US Bank Payment Plus – Single Use Credit Card**
  - Sign up at US Bank is required to properly receive payment. Option will not be activated until setup is complete. Contact [iu@supplier-services.com](mailto:iu@supplier-services.com).
- **Direct Deposit (ACH)**
  - IU sends ACH payments only in CCD format in USD.
  - IU only sends ACH payments to US-based bank accounts.
- **Wire Transfer**
  - Limited to foreign transactions only. US based suppliers will be asked to submit direct deposit details if only wire transfer information is provided.
  - Method is approved before wire transfer will be sent.
  - Payment must be made to a bank account in the same name as the supplier.
- **Check**
  - Payment is made to the remittance address on file. Please keep this information up to date.

If no payment method is selected the default payment method is a check to the remittance address on file.

**If you have a Sub-Award Contract with Indiana University requiring payment in US Dollars, set USD (United States Dollar) as the preferred currency for payments.**

Please note that Indiana University's preference for payment terms is NET 30 upon receipt of invoice because this is the shortest period in which we can consistently ensure payment. The University makes every effort to uphold our commitment to pay our vendors in a timely manner. If you have questions or concerns, contact Indiana University Office of Procurement Services via our [Support Form](#), or by phone at 812.855.3720.

**Required Information**  
At least one payment type is required to complete this section.

No payment information has been entered.

Add Payment Information ▼

◀ Previous    Next ▶

You may enter multiple payment methods but may only have one active payment method.

### Payment via Direct Deposit (ACH)

Select **Direct Deposit (ACH)** from the drop-down menu. A new window opens where you can enter your banking information.

**Required Information**  
At least one payment type is required to complete this section.

No payment information has been entered.

Add Payment Information ▼

- Direct Deposit (ACH)
- Check
- Wire Transfer

Reminder: fields marked with a star are required. All other fields are optional.

**Electronic Remittance Email** field (Required): Enter an email address in this field to receive a notification when a payment is made using this banking information.

### Add Payment Information ✕

Only associated countries are displayed.

Payment Title *	<input type="text" value="ACH"/>
Country *	<input style="border-bottom: 1px solid #ccc;" type="text" value="United States"/>
Payment Type *	Direct Deposit (ACH)
Direct Deposit Format	<input style="border-bottom: 1px solid #ccc;" type="text" value="ACH"/>
Remittance Address	<input type="text" value="Business (Remittance)"/>
Electronic Remittance Email *	<input type="text" value="AR@SP.com"/>
Currency *	<input type="text" value="USD"/>

Next, enter your bank account information in the **Bank Account** section. Click the **What is this?** link for help locating your routing and account numbers.

Routing and account numbers are not the same as debit or credit card numbers.

Click **Save Changes** to save your work.

#### Bank Account

Country *	<input style="border-bottom: 1px solid #ccc;" type="text" value="United States"/>
Bank Name *	<input type="text" value="Indiana Credit Union"/>
Account Holder's Name *	<input type="text" value="The Sampson Project"/>
Account Type *	<input type="text" value="Checking"/>
Routing/Transit Number *	<input type="text" value="xxxxxxx"/>
	<a href="#" style="color: #0070c0; text-decoration: none; border: 1px solid red; padding: 2px;">What is this?</a>
Account Number *	<input type="text" value="xxxxxxxxxxx"/>
Confirm Account Number *	<input type="text" value="xxxxxxxxxxx"/>



### Payment via Check

Select **Check** from the drop-down menu. A new window opens to collect additional payment details.

**Required Information**  
At least one payment type is required to complete this section.

*No payment information has been entered.*

**Add Payment Information** ▾

- Direct Deposit (ACH)
- Check
- Wire Transfer

Reminder: fields marked with a star are required. All other fields are optional.

If you wish to receive an email notification when payment is issued via this method, enter your email address in the **Electronic Remittance Email** field. Click **Save Changes** to save your work.

Setup between IU and US Bank is required to properly receive payment. Method will Contact [supplier@iu.edu](mailto:supplier@iu.edu).

**Add Payment Information** ×

Only associated countries are displayed.

Payment Title \* Paper Check

Country \* United States ▾

Payment Type \* Check

Electronic Remittance Email

Currency \* USD ▾

Active  Yes  No

\* Required to Complete Registration

**Save Changes** Close

Once payment information is entered, click **Next**.

**The Sampson Project**

Registration **In Progress** for:  
Indiana University TEST SITE  
**8 of 9** Steps Complete

- Welcome
- Company Overview ✓
- Business Details ✓
- Addresses ✓
- Contacts ✓
- Diversity ✓
- Insurance ✓
- Payment Information** ✓
- Tax Information ⚠
- Supplier Information ✓
- Certify & Submit

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

### Payment Information ?

**IMPORTANT:** Currency on all invoices must match the currency stated on Indiana University issued purchase orders.

Information on this page is used to determine how and where you will receive payment. Please enter an email address if you wish to receive an email notification regarding payments including invoice, date, and amount.

The order of prioritization of payment methods is:

- **US Bank Payment Plus – Single Use Credit Card**
  - Sign up at US Bank is required to properly receive payment. Option will not be activated until setup is complete. Contact [iu@supplier-services.com](mailto:iu@supplier-services.com).
- **Direct Deposit (ACH)**
  - IU sends ACH payments only in CCD format in USD.
  - IU only sends ACH payments to US-based bank accounts.
- **Wire Transfer**
  - Limited to foreign transactions only. US based suppliers will be asked to submit direct deposit details if only wire transfer information is provided.
  - Method is approved before wire transfer will be sent.
  - Payment must be made to a bank account in the same name as the supplier.
- **Check**
  - Payment is made to the remittance address on file. Please keep this information up to date.

If no payment method is selected the default payment method is a check to the remittance address on file.

If you have a Sub-Award Contract with Indiana University requiring payment in US Dollars, set USD (United States Dollar) as the preferred currency for payments.

Please note that Indiana University's preference for payment terms is NET 30 upon receipt of invoice because this is the shortest period in which we can consistently ensure payment. The University makes every effort to uphold our commitment to pay our vendors in a timely manner. If you have questions or concerns, contact Indiana University Office of Procurement Services via our [Support Form](#), or by phone at 812.855.3720.

Title	Payment Type	Currency	Active	
ACH	Direct Deposit (ACH)	USD	Yes	<a href="#">Edit</a>

[Add Payment Information](#)

[◀ Previous](#)
[Next ▶](#)

## Tax Information

A completed and signed W-9 tax form is required to complete registration. Click **Add Tax Document** and select **W-9**.

**Kirk, James**

Registration **In Progress** for:  
Indiana University  
**4 of 5** Steps Complete

- Welcome
- Individual Overview ✓
- Addresses ✓
- Contacts ✓
- Payment Information ✓
- Tax Information** ⚠

### Tax Information ?

Tax Information is used for payment. Please download prefilled form, review for accuracy, sign and upload.

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

*No tax information has been entered*

[Add Tax Document](#)

W-9

#### Additional Questions

Enter a name for the tax form in the **Tax Document Name** field and select the year the form was signed from the **Tax Document Year** drop-down menu.

If you already have a completed tax document on hand, click **Select file** to upload the document.

The screenshot shows a modal window titled "Add Tax Document" with a close button (X) in the top right corner. The form contains the following fields:
 

- Tax Type: W-9
- Tax Document Name: Sampson Project
- Tax Document Year: 2021
- Tax Documentation: A file upload area with a "Select file" button highlighted by a red box and the text "Drop file to attach, or browse." below it.

 At the bottom of the form, there is a blue link "Download Pre-populated Tax Document" and a footer containing the text "★ Required to Complete Registration", a "Save Changes" button, and a "Close" button.

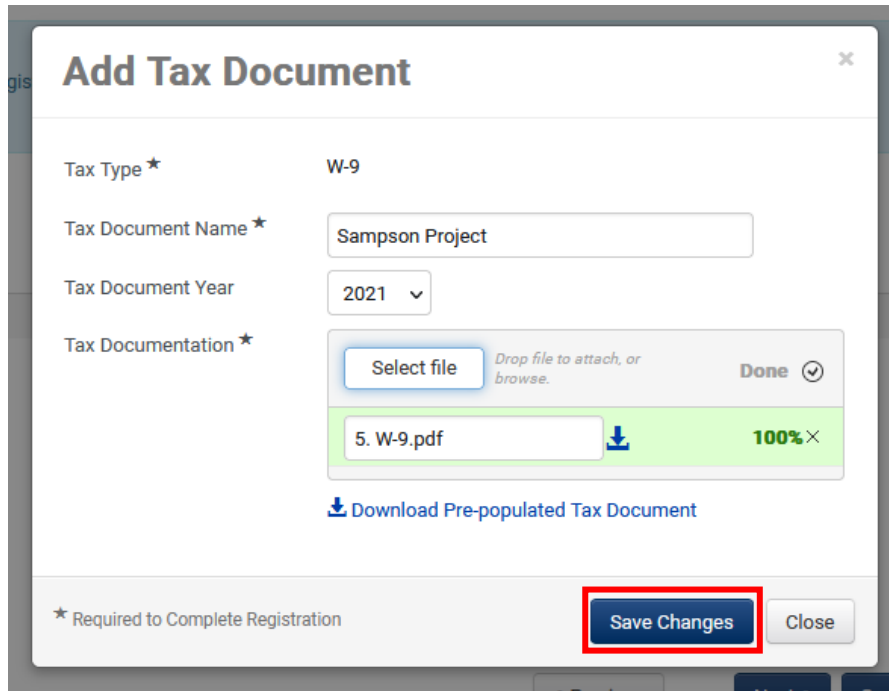
If you do not have a completed W-9 form saved to your computer, click **Download Pre-populated Tax Document**. Jaggaer generates a W-9 tax form which contains information previously entered during the registration process.

This screenshot is identical to the one above, showing the "Add Tax Document" form. In this version, the "Download Pre-populated Tax Document" link is highlighted with a red box, indicating the alternative action for users who do not have a saved W-9 form.

Print the tax form, sign and date, and scan the document. The signed document can then be uploaded by clicking **Select file**. Alternatively, you may sign the document with a digital signature, such as AdobeSign.

***The tax form MUST be signed to satisfy this requirement. Please double check and verify the form is signed and complete prior to uploading.***

Once uploaded, click **Save Changes** to upload the document to your profile.



**Add Tax Document**


Tax Type ★ W-9

Tax Document Name ★ Sampson Project

Tax Document Year 2021

Tax Documentation ★

Select file Drop file to attach, or browse. Done ✓

5. W-9.pdf  **100%** ×

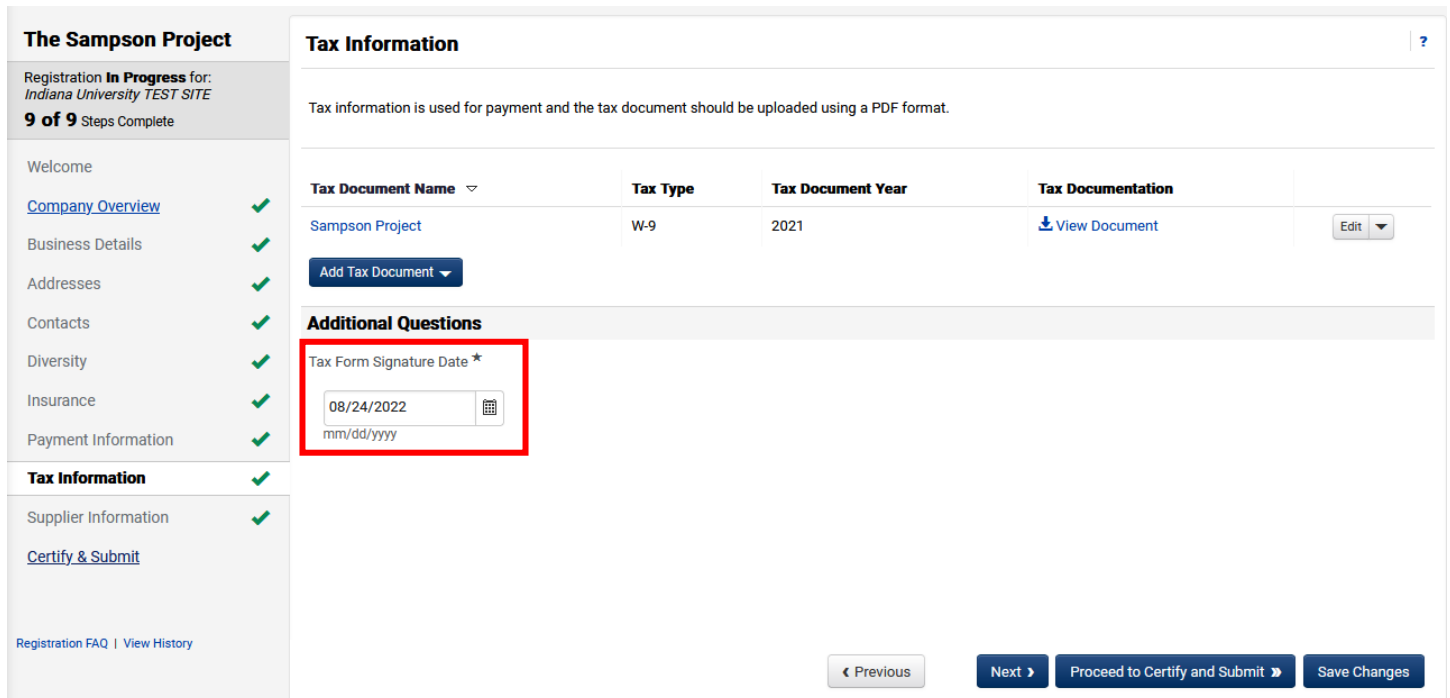
[Download Pre-populated Tax Document](#)

★ Required to Complete Registration

**Save Changes** Close

Enter the date the form was signed in the **Tax Form Signature Date** field. You may also select the date using the calendar widget to the right of the field.

Click **Save Changes** to save your progress and **Next** or **Proceed to Certify and Submit** to continue.



**The Sampson Project**

Registration **In Progress** for: *Indiana University TEST SITE*  
**9 of 9** Steps Complete

Welcome

[Company Overview](#) ✓

Business Details ✓

Addresses ✓

Contacts ✓

Diversity ✓

Insurance ✓

Payment Information ✓

**Tax Information** ✓

Supplier Information ✓

[Certify & Submit](#)

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

**Tax Information** ?


Tax information is used for payment and the tax document should be uploaded using a PDF format.

Tax Document Name	Tax Type	Tax Document Year	Tax Documentation
Sampson Project	W-9	2021	<a href="#">View Document</a>

[Add Tax Document](#)

**Additional Questions**

Tax Form Signature Date ★

08/24/2022   
 mm/dd/yyyy

[Previous](#) [Next](#) [Proceed to Certify and Submit](#) [Save Changes](#)

## Supplier Information

This section is optional for **Shipping Terms**

### The Sampson Project

Registration **In Progress** for:  
Indiana University TEST SITE  
**9 of 9** Steps Complete

- Welcome
- Company Overview ✓
- Business Details ✓
- Addresses ✓
- Contacts ✓
- Diversity ✓
- Insurance ✓
- Payment Information ✓
- Tax Information ✓
- Supplier Information ✓**

[Certify & Submit](#)

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

### Supplier Information

Watch help video here: [link here](#)

---

Shipping Payment Terms

IU Pays, Part of PO ("Prepaid and Add") ▾

IU Pays, Part of PO ("Prepaid and Add")

IU Pays, Separate Bill ("Collect")

Vendor Pays ("Allowed")

Paid by 3rd Party

★ Required to Complete Registration

◀ Previous
Next ▶
Proceed to Certify and Submit ▶
Save Changes

Click **Proceed to Certify and Submit**

## Certify & Submit

Finally, verify your name, title, and email address in the appropriate fields. Prior to submission, you can review or update a section by selecting it from the left-hand menu.

### The Sampson Project

Registration **In Progress** for:  
Indiana University TEST SITE  
**9 of 9** Steps Complete

- Welcome
- Company Overview ✓
- Business Details ✓
- Addresses ✓
- Contacts ✓
- Diversity ✓
- Insurance ✓
- Payment Information ✓
- Tax Information ✓
- Supplier Information ✓
- Certify & Submit**

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

### Certify & Submit

Please type your initials in the box below acknowledging that you are a company official and that all information is correct. It is the Supplier's responsibility to ensure company information is accurate and that company information is kept current. Inaccurate company information may result in payment delays.

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 us.

Preparer's Initials \*

Preparer's Name \*

Preparer's Title \*

Preparer's Email Address \*

Today's Date

Certification \*  I certify that all information provided is true and accurate.

★ Required to Complete Registration

Submit

Once you are satisfied that the information you have entered is correct, **check the box** next to **Certification** and click **Submit**.

After submission, you will see a confirmation screen like the one below.

INDIANA UNIVERSITY

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.

### Thank You for Registering

Registration Complete for The Sampson Project!

#### 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

Additionally, you will receive an email confirming your submission.

### Supplier Registration Complete for Indiana University



Indiana U  
To

<buyiu.noreply@iu.edu>

If there are problems with how this message is displayed, click here to view it in a web browser.

## Supplier Registration Complete for Indiana University

Dear The Sampson Project,

Thank you for completing your Jaggaer registration profile. Your information has been submitted to Indiana University TEST SITE and is awaiting review. The IU Supplier Workgroup will contact you with any questions they may have. As a reminder, you can log into your secure account by visiting Indiana University TEST SITE's [Customer Portal Login Link](#)

In the meantime, we encourage you to review our [For Suppliers page](#) for additional information regarding the features of your new portal, including invoice submission and payment tracking. You may login to your portal at any time by visiting the [Jaggaer Customer Portal page](#).

Please contact the IU Supplier Workgroup with any questions by emailing or calling (812) 855-3720, option 1.

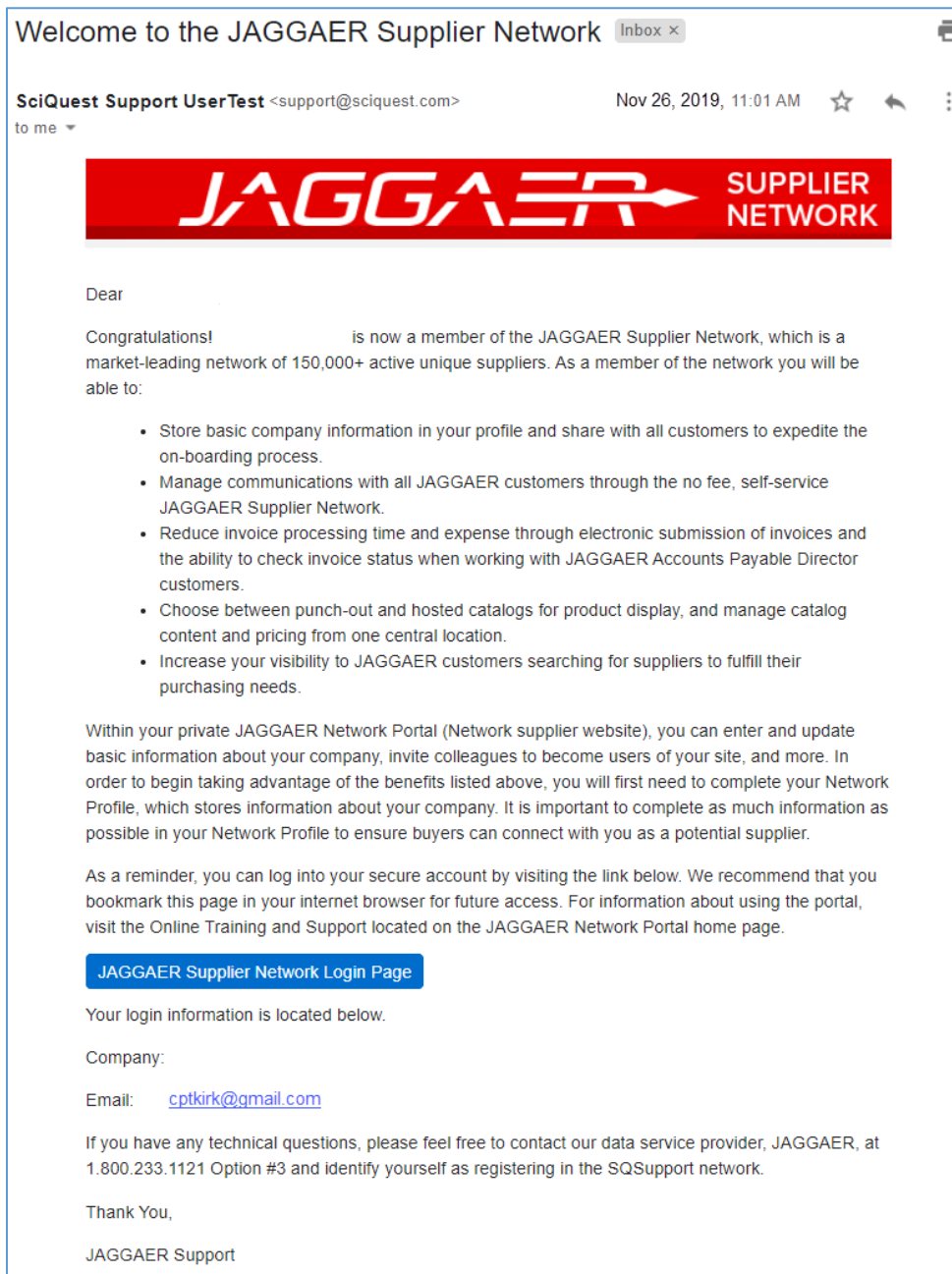
Thank You,

Indiana University

## Registration Approval

IU Purchasing will review your information and contact you if any additional information is needed. Communication will be sent via email from the address [buyiu.noreply@iu.edu](mailto:buyiu.noreply@iu.edu) or [helpmeiu@iu.edu](mailto:helpmeiu@iu.edu)

Once your registration is approved, you will receive a confirmation email like the one below. This message will come from [support@sciqwest.com](mailto:support@sciqwest.com). This confirmation notice may take up to 48 hours to be delivered.



Congratulations! You are now a member of the Jaggaer supplier network and may receive payments from IU.

## Continue Registration

Access your supplier registration by [logging in on the Jaggaer supplier portal](#). Once logged in, click **Indiana University** in the Customer Portal Access section.

The screenshot shows the JAGGAER SUPPLIER NETWORK interface. The user is logged in as James Kirk. The main content area includes a profile section for James Kirk with a JAGGAER Network ID of 1001602284 and links for viewing the company profile, managing registrations, and sending new user requests. Below this is a 'Create Invoice / Credit Memo' section with a warning that no customers have authorized invoice creation. The 'Customer Portal Access' section contains a table with the following data:

Customer	Registration Status	Customer Contact
Indiana University	Complete	Indiana University

A red arrow points to the 'Indiana University' entry in the table. Other sections include 'Find Invoice' and 'Need Assistance?'.

If it's the first time you're accessing your portal after your initial login, a pop-up window will appear notifying you that you are leaving the Jaggaer portal and continuing to the Indiana University portal.

**Check the box** next to Don't show me this again and click **OK** to dismiss the message and continue.

The screenshot shows a 'Customer Portal Access' pop-up window. The text inside reads: 'You are being redirected to the **Indiana University** portal, where you can manage your relevant data, invoices, and events. To return to the network portal, access your user name at the top of the page and "Return to JAGGAER Supplier Network."' Below the text is a checkbox labeled 'Don't show me this again' and two buttons: 'OK' and 'Close'. Red boxes highlight the checkbox and the 'OK' button.



In the IU portal, click **Manage Registration Profile** to continue completing the registration process.

The screenshot shows the Indiana University Supplier Portal home page. The header includes the JAGGAER logo and 'INDIANA UNIVERSITY'. A navigation bar shows 'Home' and 'Customer Portal Home'. A banner at the top states: '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'. The main content area is divided into several sections:
 

- Welcome to the Indiana University Supplier Portal:** A message of appreciation and a link to the 'Support Form'.
- Customer Contact:** A table with the following information:
 

Name	Indiana University
Title	Supplier Data Management
Email	buyiu.noreply@iu.edu
Phone	+1 812-855-3720
- Quick Links to Common Tasks:** A list of links, with 'Manage Registration Profile' highlighted by a red box.
- Sourcing Events:** A section with a 'Show' dropdown menu set to 'Opening or Closing Soon', a 'Go to Public Opportunities' link, and 'No Results' displayed twice. A 'View All Events' link is at the bottom right.
- Contracts:** A section with a question mark icon.

Select a section from the left-hand menu to continue registering. Sections marked with a green checkmark are complete. Gray checkmarks represent sections which require additional information.

The screenshot shows the 'Manage Registration Profile' page. The header includes the JAGGAER logo and 'INDIANA UNIVERSITY'. A navigation bar shows 'Registration' and 'Manage Registration Profile'. A banner at the top states: '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'. The main content area is divided into several sections:
 

- The Sampson Project:** A section with the text 'Registration Complete for: Indiana University TEST SITE'.
- Welcome:** A message of welcome and a link to the 'Support Form'.
- Company Overview:** A section with a green checkmark.
- Business Details:** A section with a green checkmark.
- Addresses:** A section with a green checkmark.
- Contacts:** A section with a green checkmark.
- Diversity:** A section with a green checkmark.
- Insurance:** A section with a green checkmark.
- Payment Information:** A section with a green checkmark.
- Tax Information:** A section with a green checkmark.
- Supplier Information:** A section with a green checkmark.