Supplier Onboarding – Domestic Individual

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 individual.

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

- Indiana University supplier invitation email.
- *Optional, but encouraged, direct deposit (ACH) banking information.*
- *Optional, 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.

Contents

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 buy.iu.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.

Action Required: Complete Registration for Indiana University

IU Indiana U TEST Site <buyiu.noreply@iu.edu>
To ✓ Nichols, Tyler

☺ ↩ Reply ↩ Reply All → Forward ⋯
Thu 3/7/2024 4:35 PM

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

Ⓘ INDIANA UNIVERSITY

Individual Invitation for Indiana University TEST SITE

Dear James Kirk,
TEST ENVIRONMENT

You are receiving this message because a department at Indiana University has invited you to do business with IU. You must complete the registration process to receive payment from IU.

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

Register Now

For assistance completing the registration process, call (812) 855-6101 or email helpmeiu@iu.edu. An IU Onboarding Consultant will address any questions you may have.

We look forward to working with you!

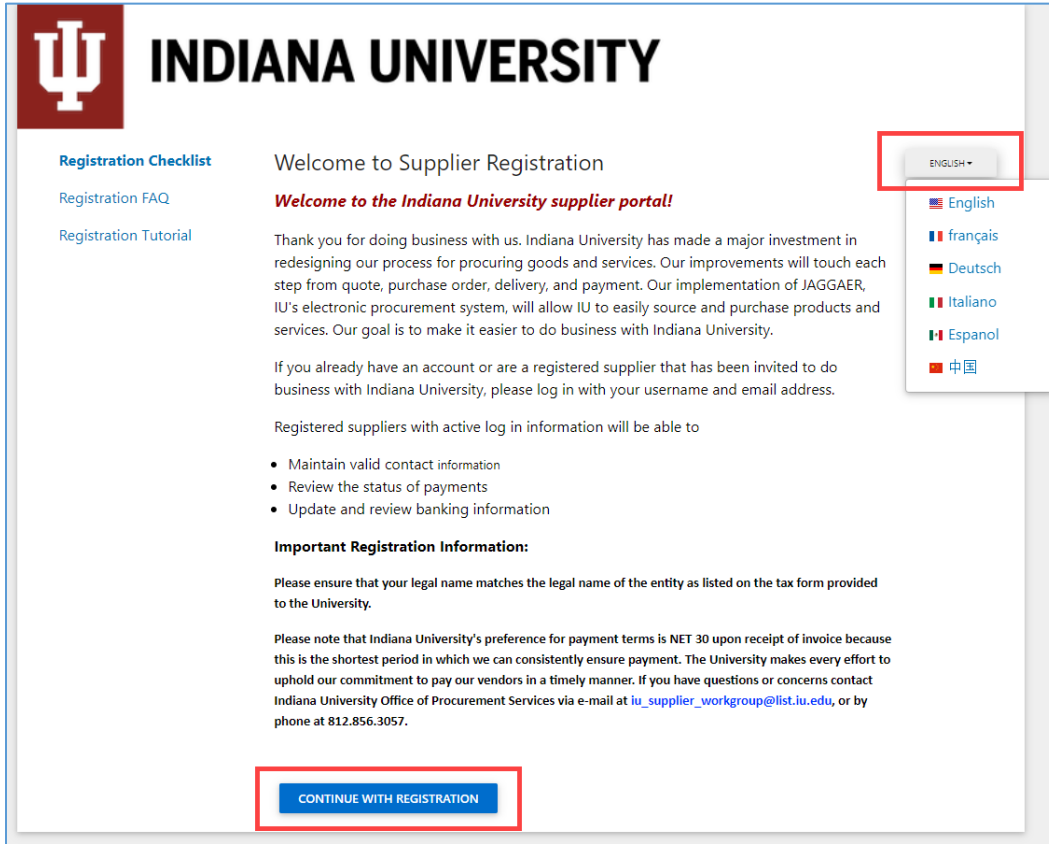Thank You,
TEST ENVIRONMENT

Indiana University TEST SITE

*You will receive an email from *Jaggaer Supplier Network* confirming your initial registration. *Jaggaer Supplier Network* hosts **BUY.IU**, Indiana University Supplier Portal. Indiana University will be listed under Customer Portal Access on the Jaggaer Supplier Network Home page.

You will also receive reminder emails from Jaggaer directly. These messages come from 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.

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.

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 gray triangle. Once the section is complete the triangle will be replaced with a green check-mark.

JAGGAER

BUY.IU

Welcome

On the Welcome page, enter your first and last names in the appropriate fields then click **Next**.

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.

Individual Overview

In the Individual Overview section, verify your **Country of Origin**. US-taxed individuals should select "**United States**."

Next, select your legal structure from the **Legal Structure** drop-down menu.
Select "**Individual/Sole Proprietor or Single-Member LLC**."

A new drop-down menu appears which allows you to enter your **Tax ID Number Type**. Select the appropriate option. In the case of an Individual/Sole Proprietor, select "**Social Security Number**."

Enter your social security number in the **Tax ID Number** field. Do not use a dash. 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.
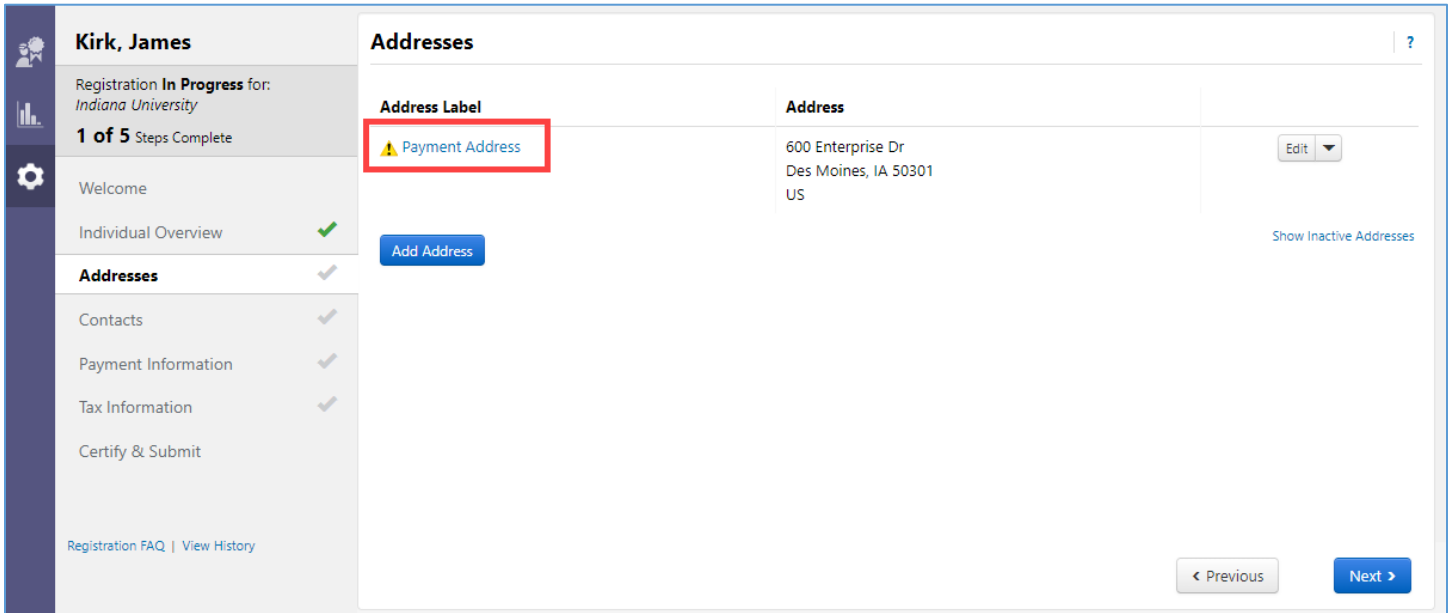
Addresses

When requesting your invitation to register, a remit address was entered on your behalf by IU staff. The remit address reflects where paper checks will be mailed.

A phone number must be associated with each address. Click the text in the **Address Label** column to add this information.
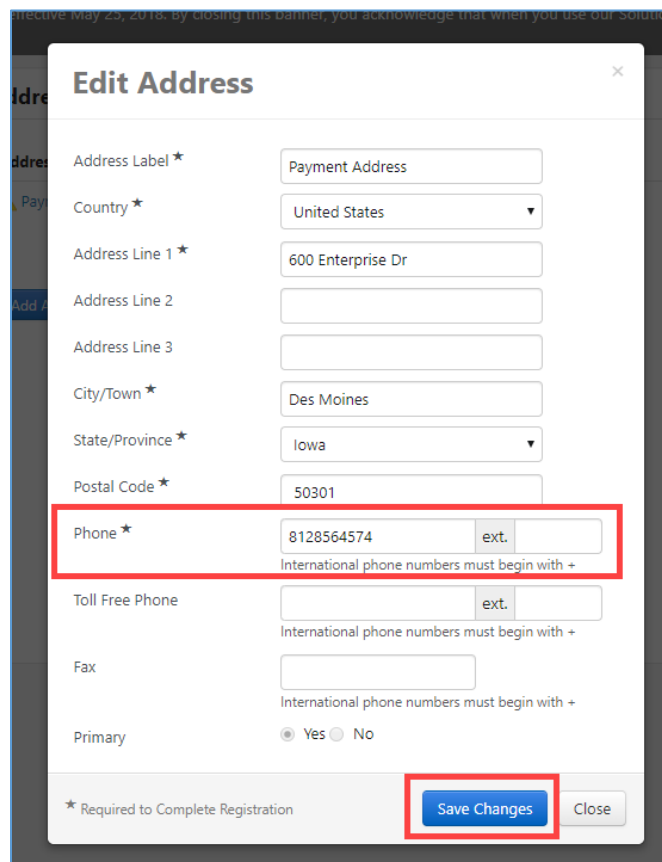
A new window opens which allows you to edit address information and add a phone number. Click **Save Changes** to save your work and exit the window.
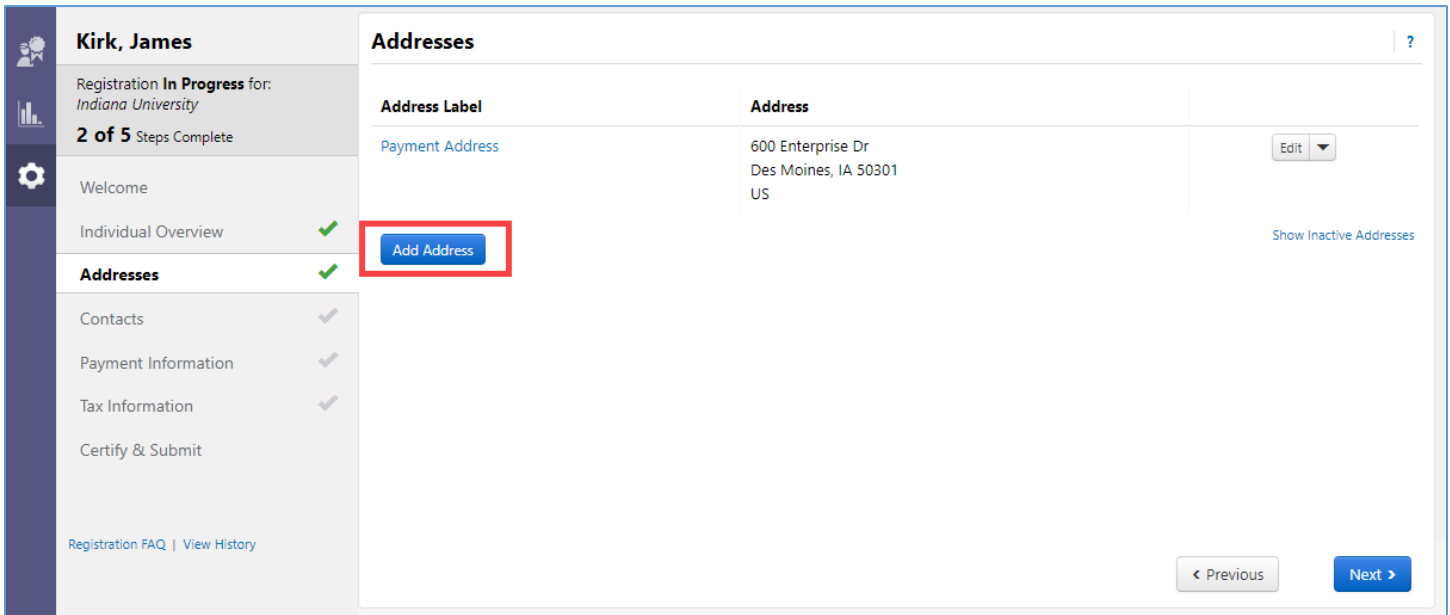
A fulfillment address is also required **if different** from your payment address.

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

Click **Next** to continue to step 2.

If desired, associate a contact with the address, or choose the radio button next to **Not Applicable** to skip this step. In most cases, this should be your own contact information. Click **Save Changes** to save your work. Contacts receive notifications related to orders and payments from IU.

Repeat the steps outlined above until all addresses are added to your profile.

Click **Next** to save your work and continue to the next section.

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** to establish yourself as a contact.
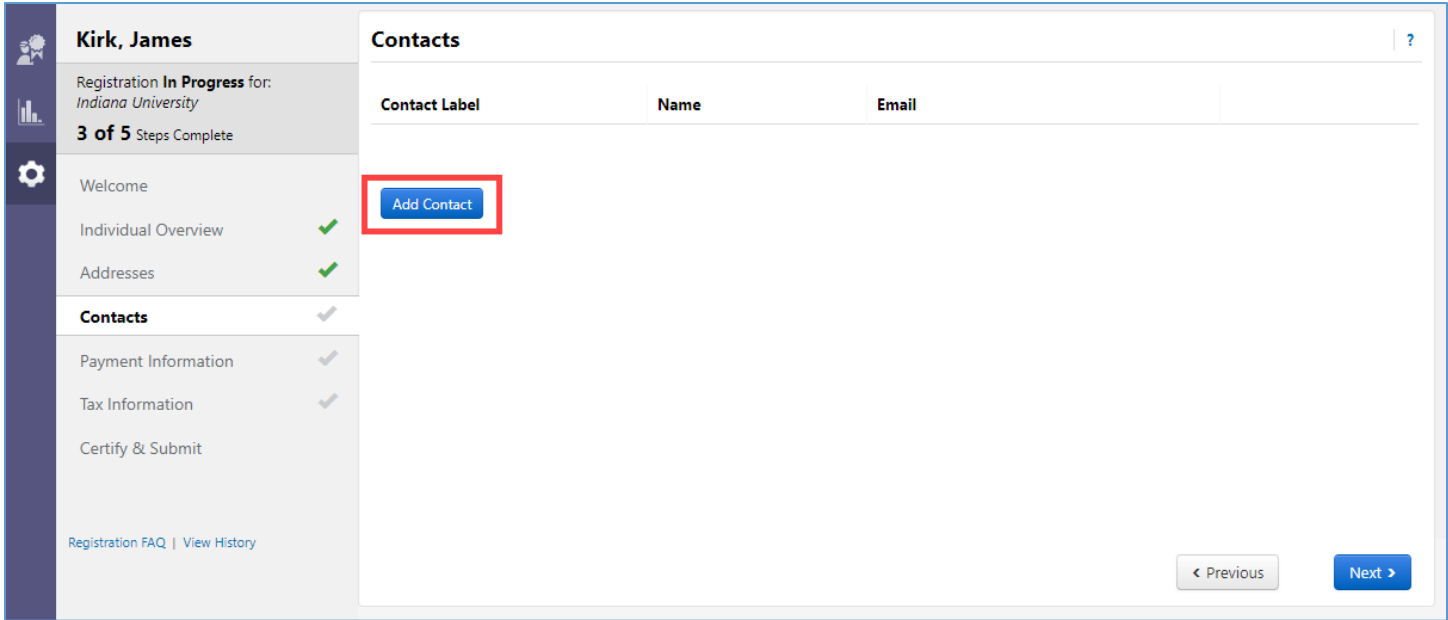
Enter your contact information in the appropriate fields.

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

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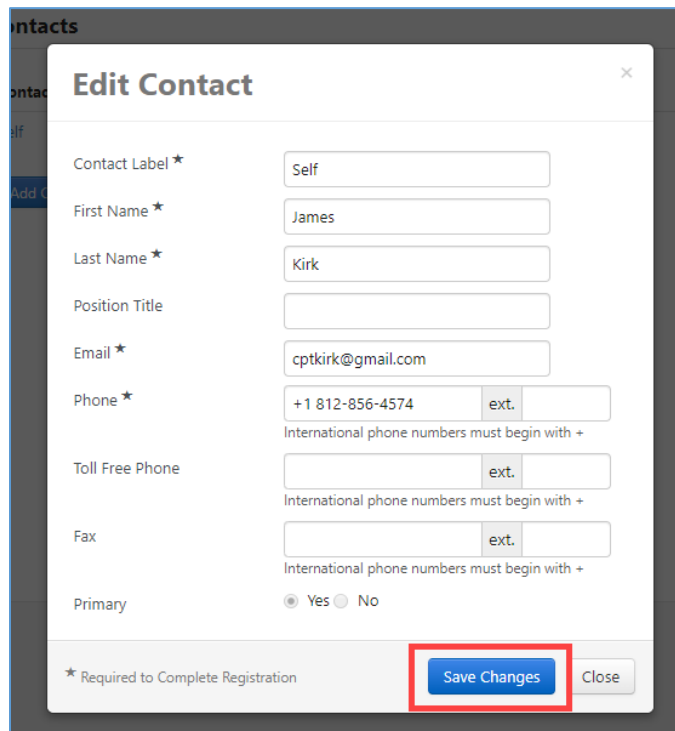
Repeat these steps as many times as desired to add additional contacts to your profile. Click **Next** to continue to the Payment Information section.

Kirk, James	**Contacts**			?
Registration **In Progress** for: *Indiana University* **3 of 5** Steps Complete	**Contact Label**	**Name**	**Email**	
	Self	Kirk, James	cptkirk@gmail.com	Edit ▼
Welcome				Show Inactive Contacts
Individual Overview ✔	Add Contact			
Addresses ✔				
Contacts ✔				
Payment Information ✔				
Tax Information ✔				
Certify & Submit				
Registration FAQ | View History			‹ Previous	Next ›
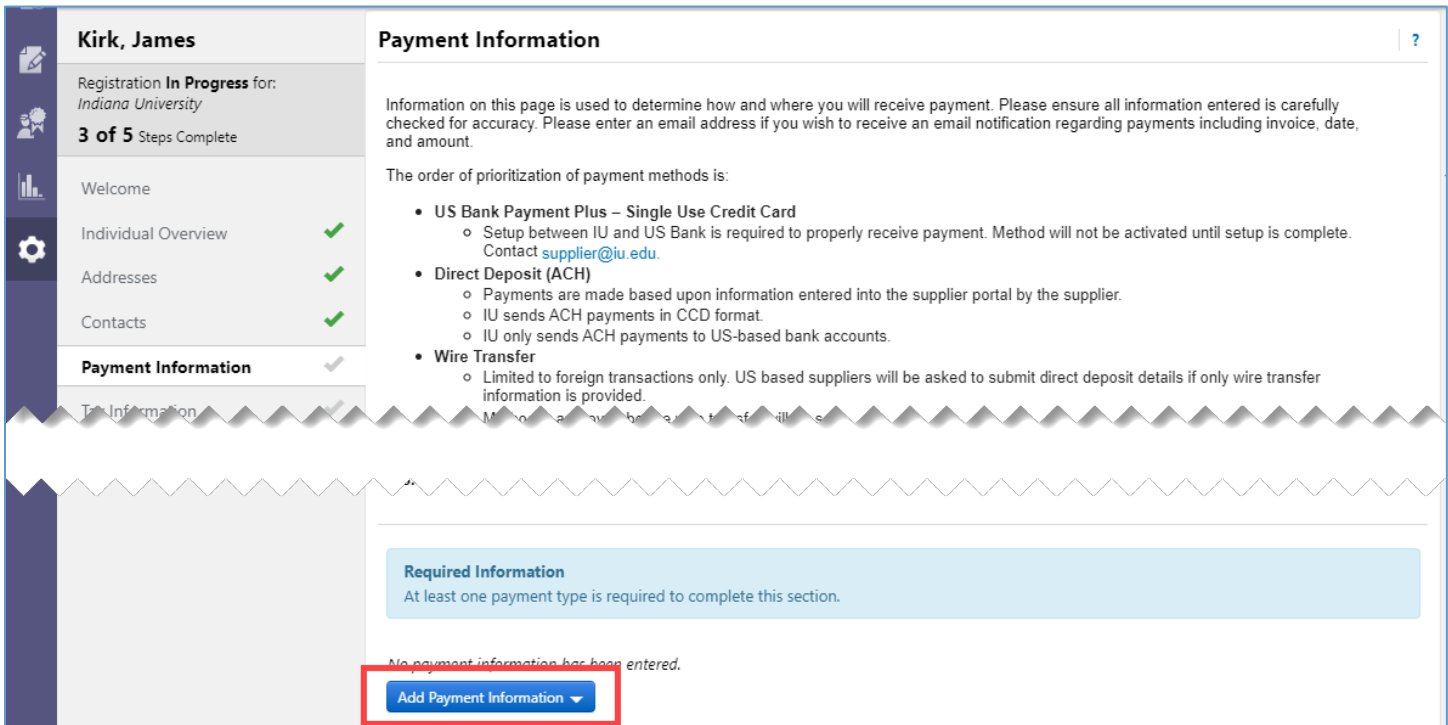
Payment Information

US-taxed individuals may elect to receive payment via direct deposit, also known as ACH, or paper check. Click **Add Payment Information** and select your preferred method of payment. Paper checks will be mailed to the remittance address entered earlier in the registration process.

Kirk, James

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

Welcome
Individual Overview ✔
Addresses ✔
Contacts ✔
Payment Information ✔
Tax Information

Payment Information ?

Information on this page is used to determine how and where you will receive payment. Please ensure all information entered is carefully checked for accuracy. 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**
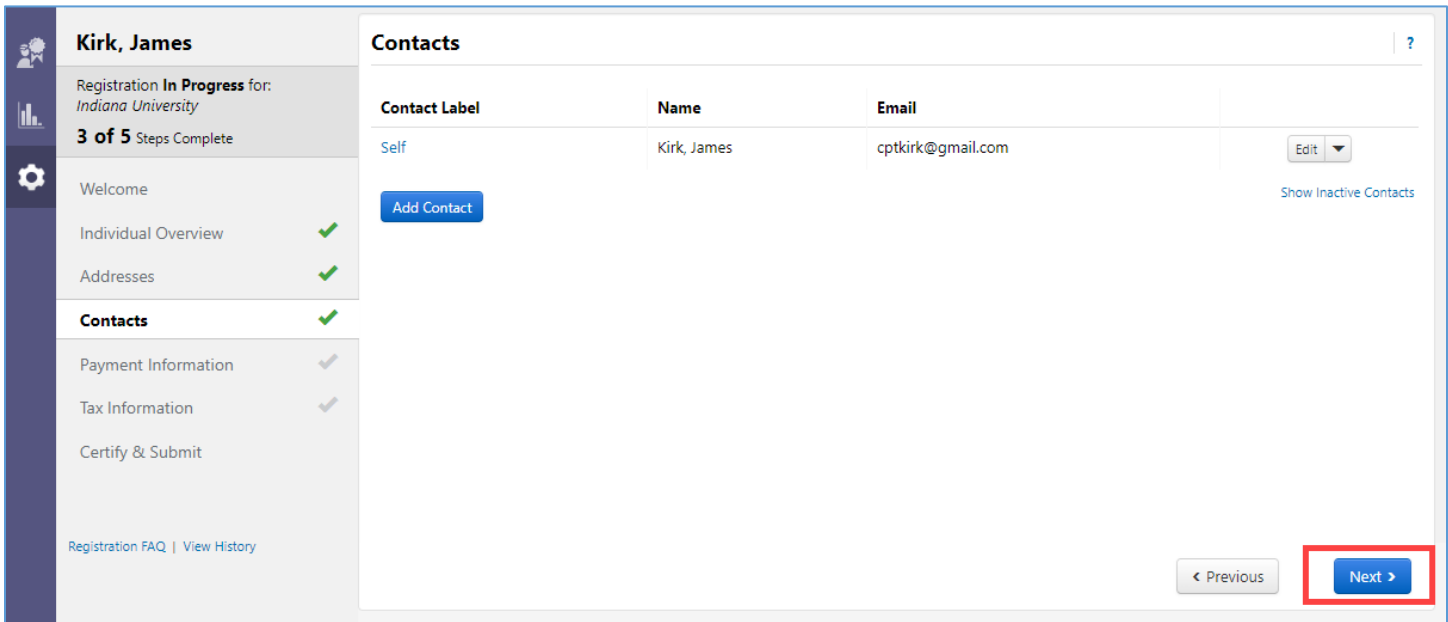 - Setup between IU and US Bank is required to properly receive payment. Method will not be activated until setup is complete. Contact supplier@iu.edu.
- **Direct Deposit (ACH)**
  - Payments are made based upon information entered into the supplier portal by the supplier.
  - IU sends ACH payments in CCD format.
  - 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.

Required Information
At least one payment type is required to complete this section.
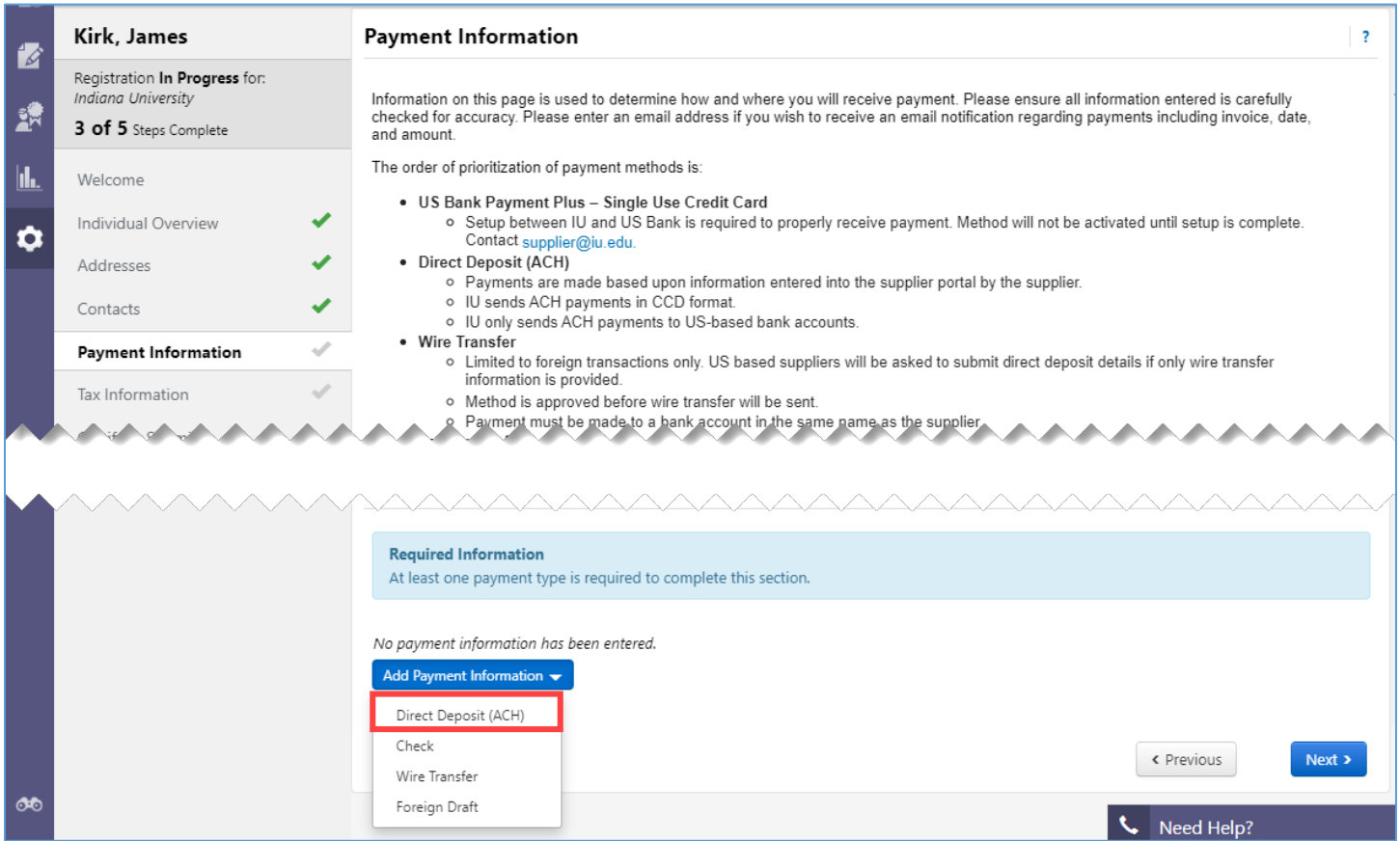
No payment information has been entered.

Add Payment Information ▼

You may enter multiple payment methods but may only have one active payment method.
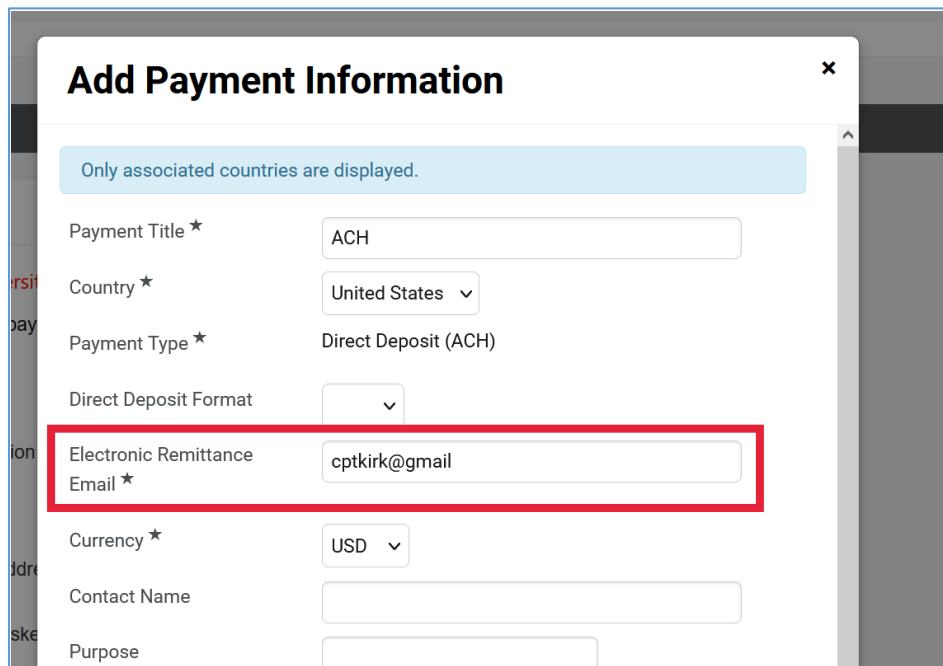
Payment via Direct Deposit (ACH)

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

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

Electronic Remittance Email (required): Enter an email address in this field to receive a notification when a payment is made using this banking information. Please use your personal email address.

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. **Note**: Payment Title is simply a title for the payment.

<div style="background-color:#ffcccc">Routing and account numbers are not the same as debit or credit card numbers.</div>

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

Add Payment Information ✕

Payment Title ★	ACH
Country ★	United States ▾
Payment Type ★	Direct Deposit (ACH)
Direct Deposit Format	▾
Electronic Remittance Email ★	cptkirk@gmail
Currency ★	USD ▾
Contact Name	
Purpose	
	200 characters remaining
Active	⦿ Yes ○ No

Bank Account

Country ★	United States ▾
Bank Name ★	GREATER IOWA CREDIT UNION
Account Holder's Name ★	James Kirk
Account Type ★	Checking ▾
SWIFT/BIC	
Routing/Transit Number ★	273972583 What is this?
	GREATER IOWA CREDIT UNION ❓
Account Number ★	1111111
Confirm Account Number ★	
Address Line 1	
Address Line 2	

★ Required to Complete Registration   **Save Changes**   Close

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Account Holder's Name (required): The Account Holder's Name must match the supplier's name. Joint bank accounts can be used provided the supplier's name is one of the listed account holders.

In the Additional Questions section, select the radio button next to **ACH** to confirm your preferred payment method.

Title ▽	Payment Type	Currency	Active	
Check	Direct Deposit (ACH)	USD	Yes	Edit

Add Payment Information ▼

Additional Questions

Wire Transfer Currency

[▼]

Please confirm the Payment Method you have selected:

- ○ Check (Paper check sent to selected remit address)
- ⦿ ACH
- ○ Wire Transfer
- ○ IU INTERNAL ONLY - DO NOT USE

- **Check (Paper check sent to selected remit address)**

- **ACH (Direct deposit electronically deposited into account provided - Domestic US entities and Individuals)**

- **Wire Transfer (Electronic transfer of funds to bank account provided - NON US entities and Individuals)**

For Wire Payments, IU requires an uploaded attachment, preferably on bank or company letterhead. The attachment should include the following:

- Swift Code
- Account Holder's Name
- Bank name
- Account number
- IBAN (if applicable)
- Sort code (if applicable)
- Intermediary Bank information (if applicable)

‹ Previous   Next ›   Save Changes

Payment via Check

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

Kirk, James

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

Welcome
Individual Overview ✓
Addresses ✓
Contacts ✓
Payment Information
Tax Information

Payment Information ?

Information on this page is used to determine how and where you will receive payment. Please ensure all information entered is carefully checked for accuracy. 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**
  - Setup between IU and US Bank is required to properly receive payment. Method will not be activated until setup is complete. Contact supplier@iu.edu.
- **Direct Deposit (ACH)**
  - Payments are made based upon information entered into the supplier portal by the supplier.
  - IU sends ACH payments in CCD format.
  - 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.

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

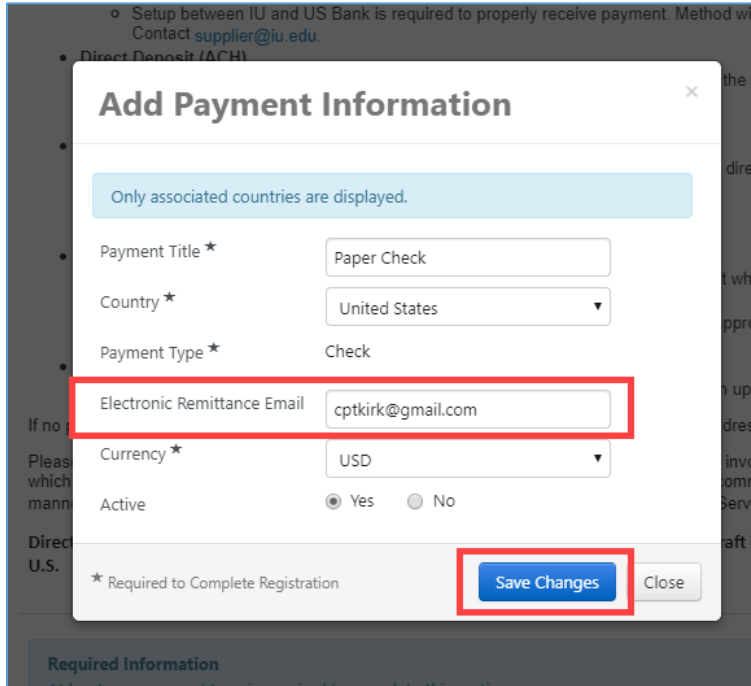No payment information has been entered.

Add Payment Information ▼
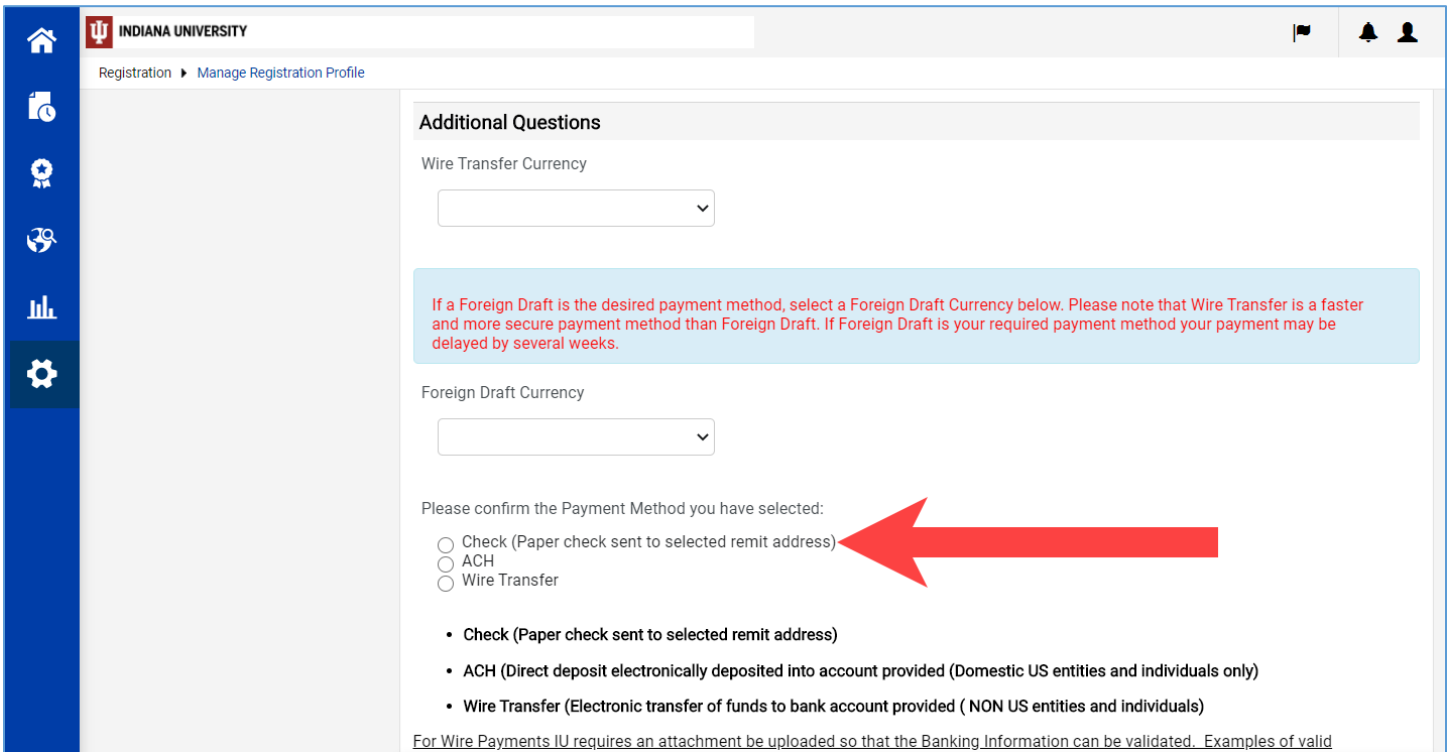
Direct Deposit (ACH)
Check
Wire Transfer
Foreign Draft

‹ Previous   Next ›

📞 Need Help?

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.

In the Additional Questions section, select the radio button next to **Check (Paper check sent to selected remit address)** to confirm your preferred payment method.

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

Tax Information

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

Enter a name for the tax form in the **Tax Document Name** field and select the revision date (located in top-left corner of the document) in the **Tax Document Year** drop-down.

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

Add Tax Document   ✕

Tax Type ★   W-9

Tax Document Name ★   [James Kirk W-9]

Tax Document Year   [2024 ⌄]

Tax Documentation   [Select file] *Drop file to attach, or browse.*

                             ⬇ Download Pre-populated Tax Document

★ Required to Complete Registration   [Save Changes] [Close]

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.

Add Tax Document   ✕

Tax Type ★   W-9

Tax Document Name ★   [James Kirk W-9]

Tax Document Year   [2024 ⌄]

Tax Documentation   [Select file] *Drop file to attach, or browse.*

                             ⬇ Download Pre-populated Tax Document

★ Required to Complete Registration   [Save Changes] [Close]

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, and upload the document.

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.

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.

Select the applicable residency determination in the **Residency Type** drop-down menu.

Certify & Submit

Finally, verify your name 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.

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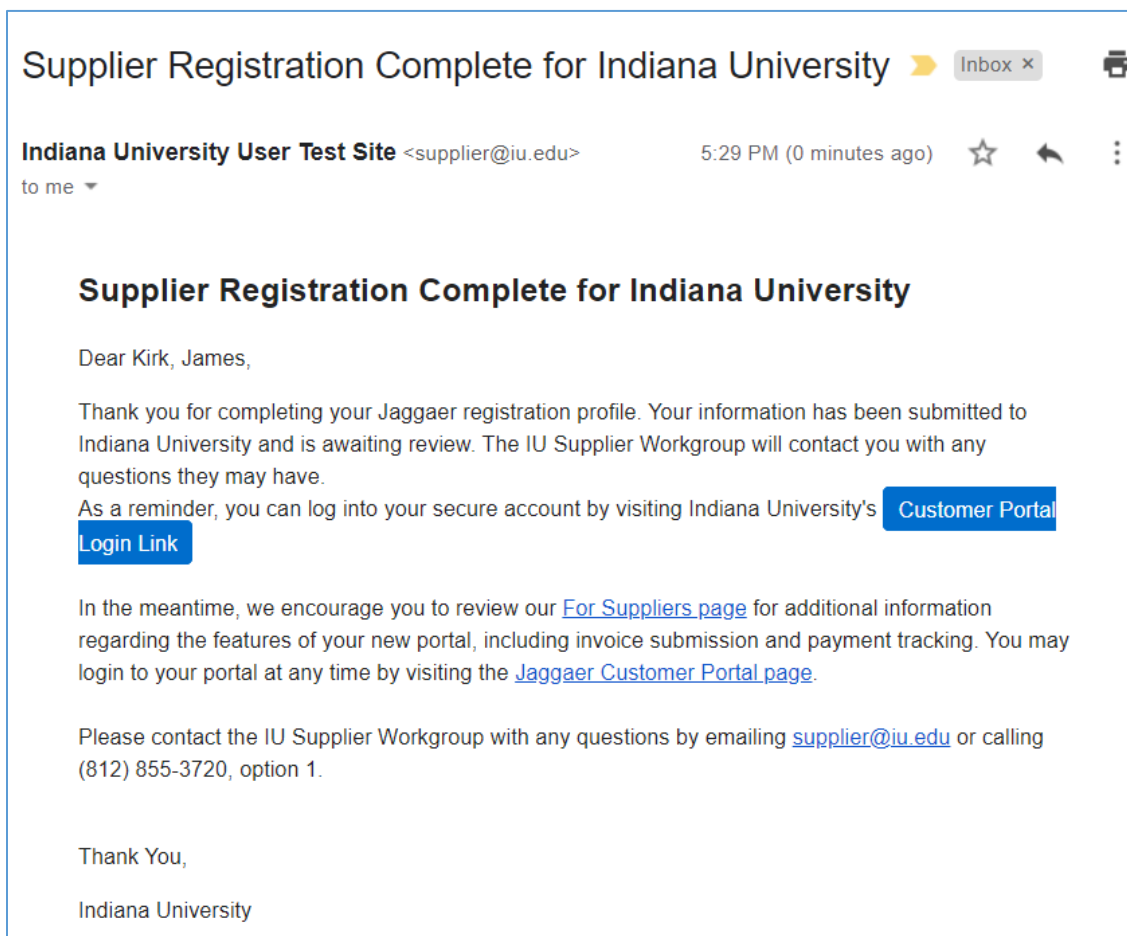
JAGGAER / BUY.IU

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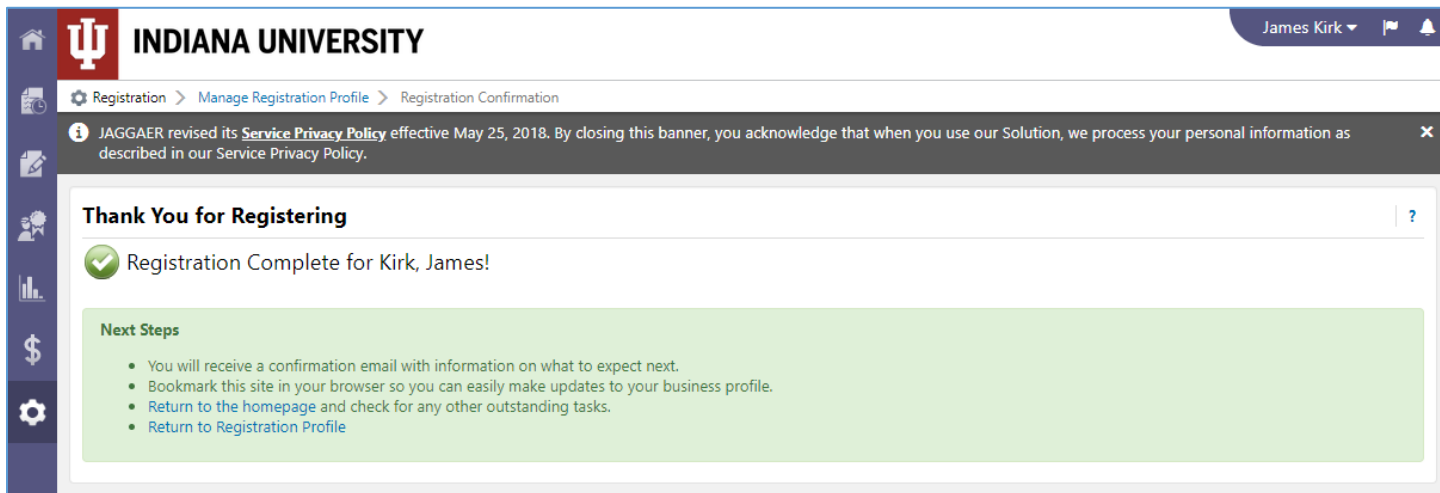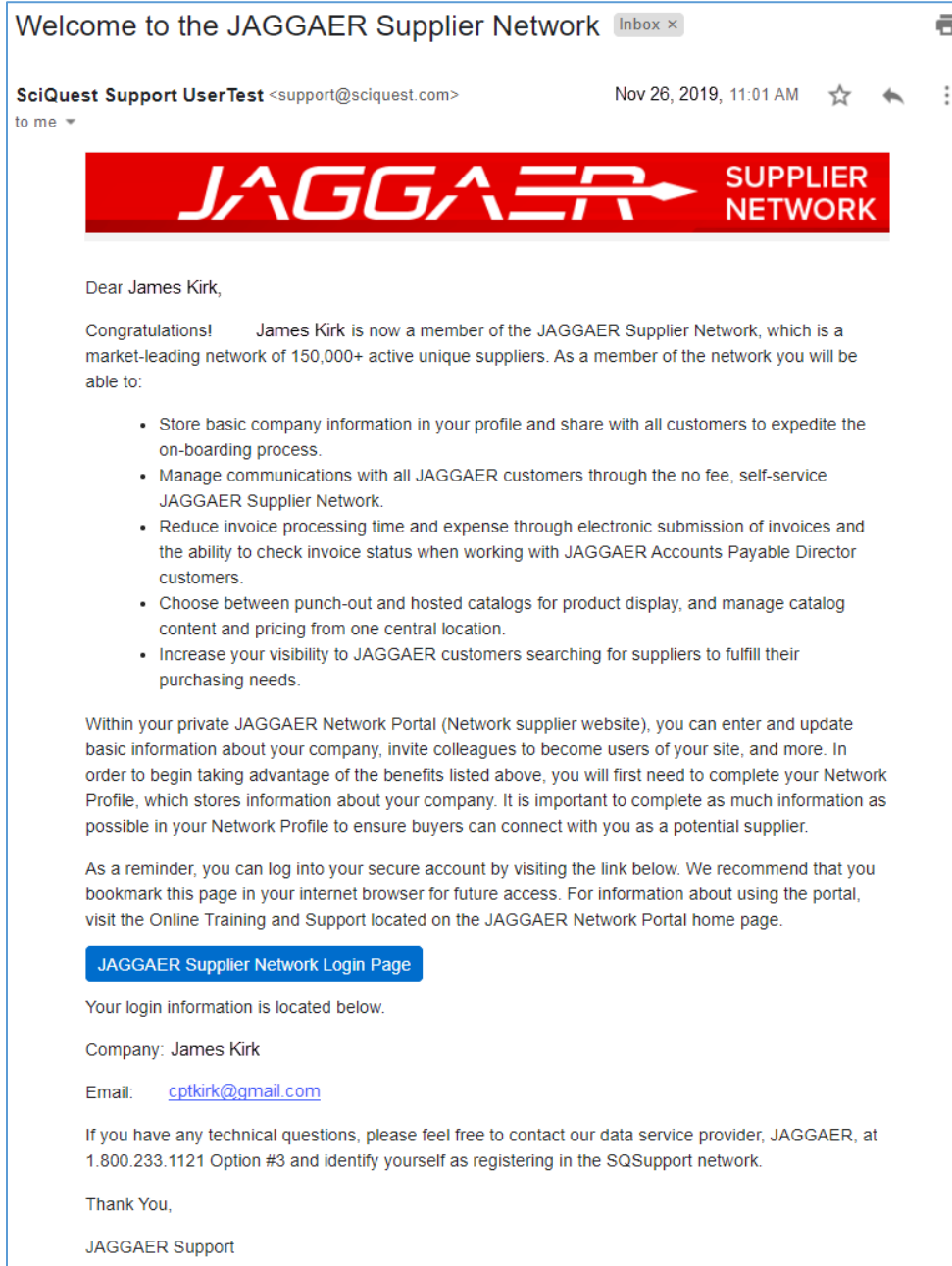

Additionally, you will receive an email confirming your submission.

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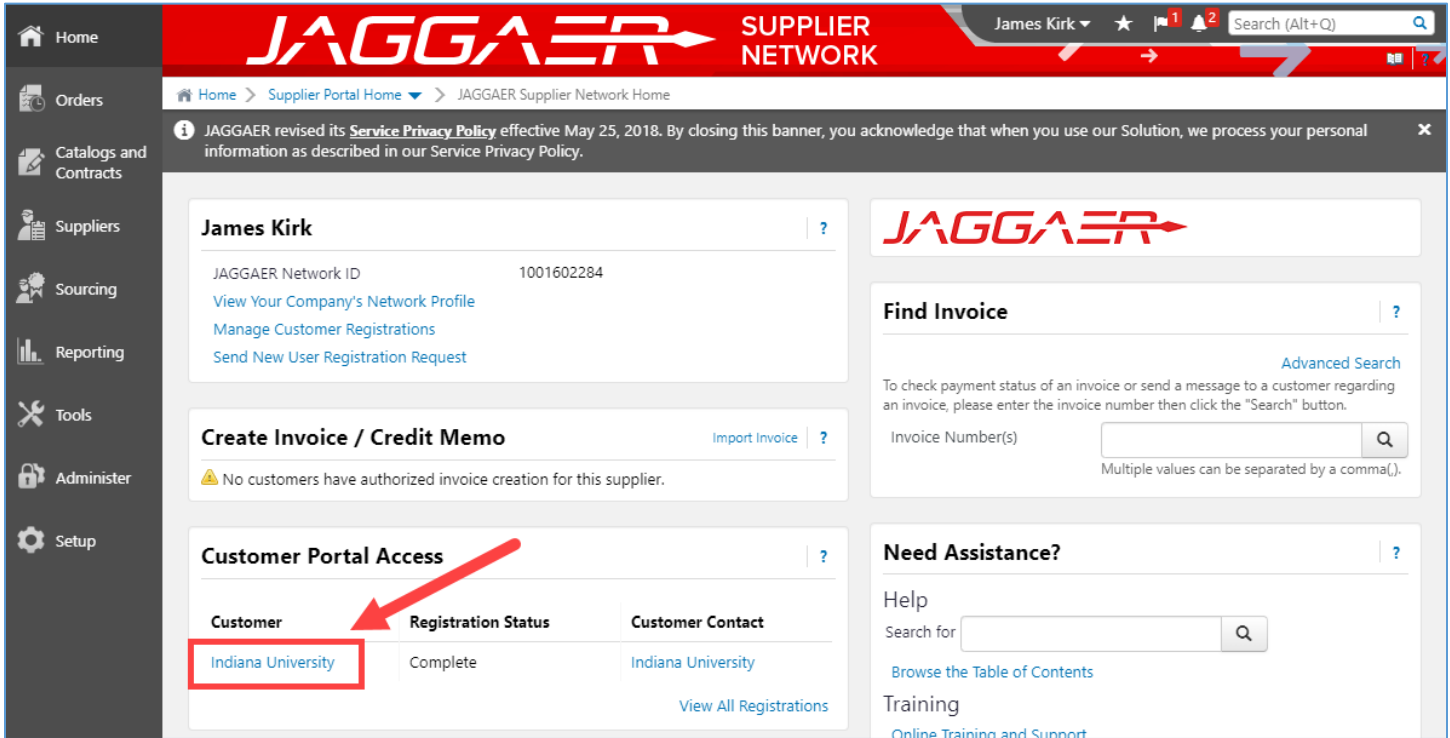
Once your registration is approved, you will receive a confirmation email like the one below. This message will come from support@sciquest.com. This confirmation notice may take up to 48 hours to be delivered.

Welcome to the JAGGAER Supplier Network Inbox ×

SciQuest Support UserTest <support@sciquest.com>   Nov 26, 2019, 11:01 AM
to me

Dear James Kirk,

Congratulations!   James Kirk is now a member of the JAGGAER Supplier Network, which is a market-leading network of 150,000+ active unique suppliers. As a member of the network you will be able to:

- Store basic company information in your profile and share with all customers to expedite the on-boarding process.
- Manage communications with all JAGGAER customers through the no fee, self-service JAGGAER Supplier Network.
- Reduce invoice processing time and expense through electronic submission of invoices and the ability to check invoice status when working with JAGGAER Accounts Payable Director customers.
- Choose between punch-out and hosted catalogs for product display, and manage catalog content and pricing from one central location.
- Increase your visibility to JAGGAER customers searching for suppliers to fulfill their purchasing needs.

Within your private JAGGAER Network Portal (Network supplier website), you can enter and update basic information about your company, invite colleagues to become users of your site, and more. In order to begin taking advantage of the benefits listed above, you will first need to complete your Network Profile, which stores information about your company. It is important to complete as much information as possible in your Network Profile to ensure buyers can connect with you as a potential supplier.

As a reminder, you can log into your secure account by visiting the link below. We recommend that you bookmark this page in your internet browser for future access. For information about using the portal, visit the Online Training and Support located on the JAGGAER Network Portal home page.

JAGGAER Supplier Network Login Page

Your login information is located below.

Company: James Kirk

Email: cptkirk@gmail.com

If you have any technical questions, please feel free to contact our data service provider, JAGGAER, at 1.800.233.1121 Option #3 and identify yourself as registering in the SQSupport network.

Thank You,

JAGGAER Support

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.
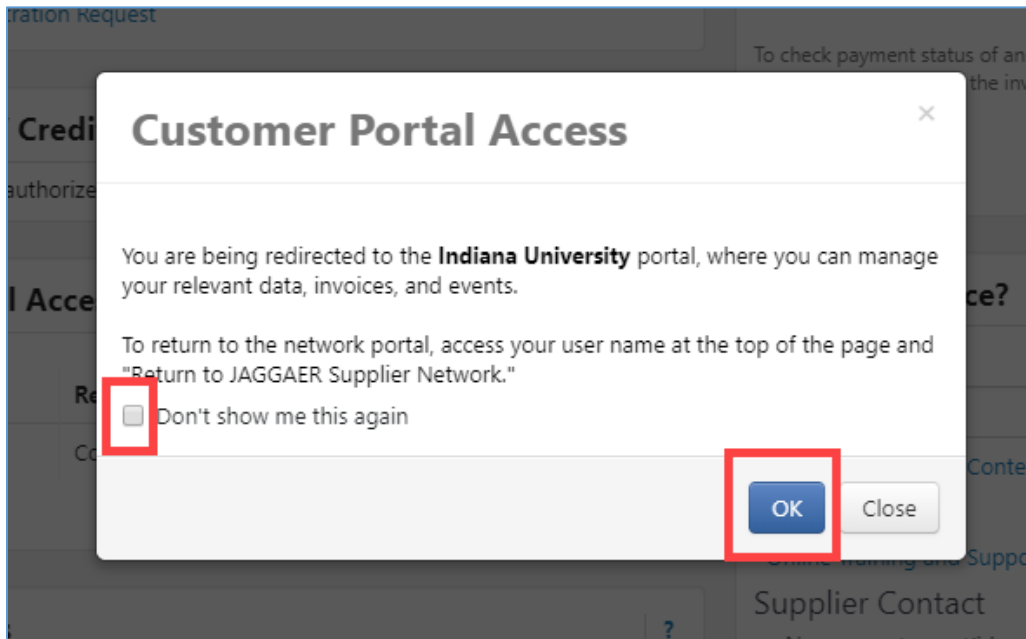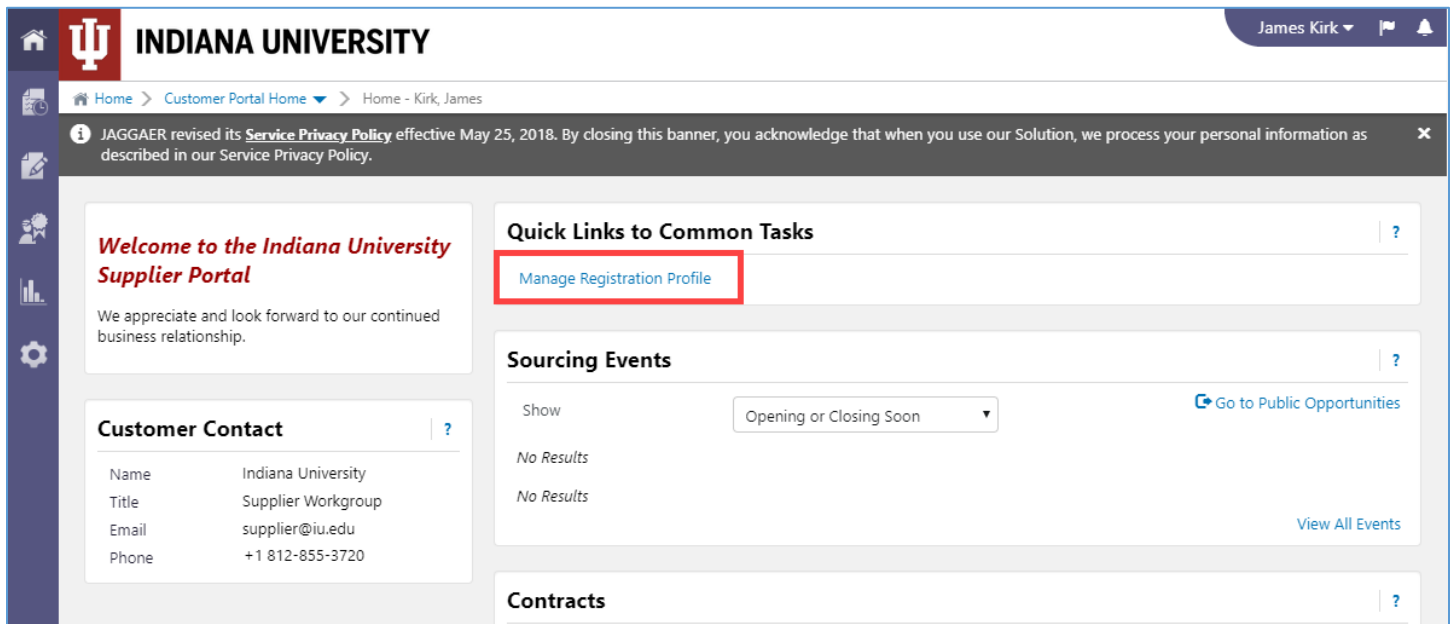

If it's the first time you're accessing your portal after your initial login, a pop-up window will appear notifying you that you are leaving the Jaggaer portal and continuing to the Indiana University portal.

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

In the IU portal, click **Manage Registration Profile** to continue completing the registration process.
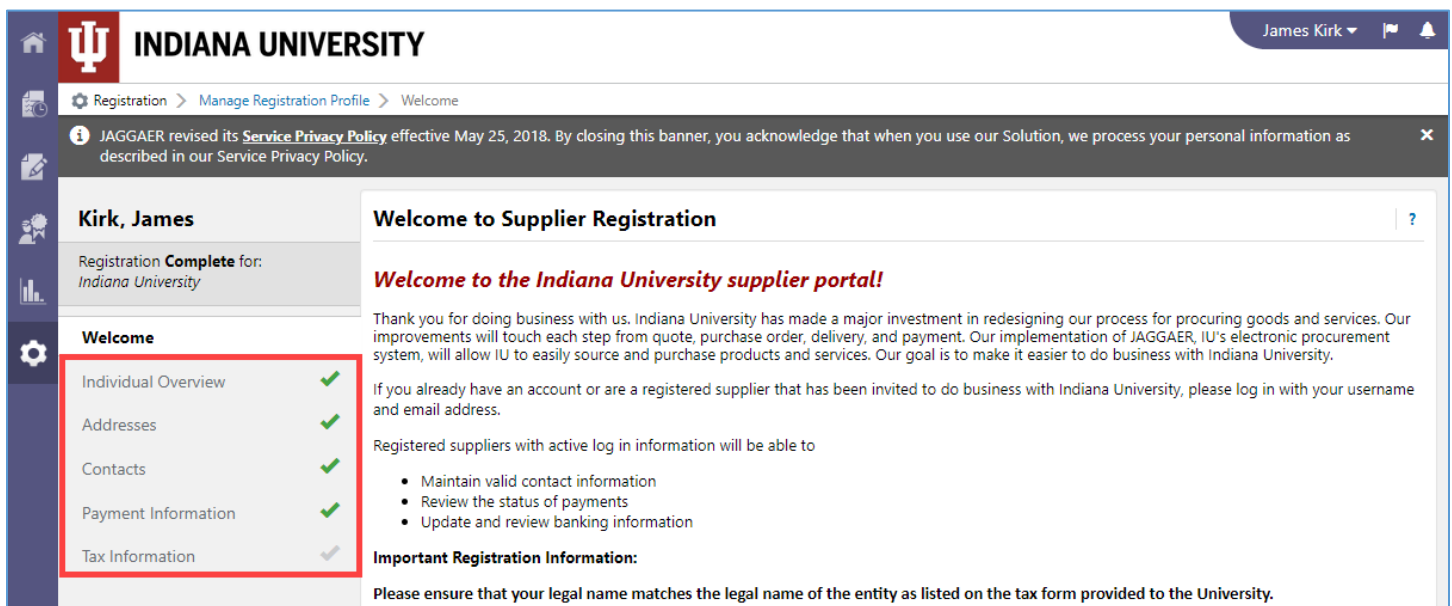
Select a section from the left-hand menu to continue registering. Sections marked with a green checkmark are complete. Gray checkmarks represent sections which require additional information.