Supplier Onboarding – International 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 foreign-taxed individual.

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

- Indiana University supplier invitation email.
- Wire transfer or foreign draft information.
- Scanned image of completed and signed W-8BEN tax form. If you do not have a completed W-8BEN tax form on hand the system will generate one for you to sign and submit.

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 supplier@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.

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. The supplier portal is available in 6 languages: English, French, German, Italian, Spanish, and Mandarin. Click the drop-down in the upper right-hand corner to select another 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. International phone numbers must begin with a “+”. Update your time zone to reflect your local 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 to the supplier portal.

**Complete and Submit Registration Information**

The supplier registration page is made up of 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 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. However, payment will not be issued until this process is complete. Click **Save Changes** to save your work and return later.
Individual Overview

In the Individual Overview section, verify your **Country of Origin**. This information was entered by IU staff when requesting your invitation. Verify that the country listed reflects the country you use for tax purposes.

Next, select your legal structure from the **Legal Structure** drop-down menu. Select **“Foreign Individual”**. If you own a business and will be compensated as such, select **“Non-US Based Entity”** from the drop-down.

Enter your US Tax ID in the **Tax ID Number** field. If you do not have a US Tax ID leave this field blank. Click **Save Changes** to save your work and **Next** to complete the Individual Overview section.
Depending on your Country of Origin, you may be eligible for Tax Treaty. Applying for Tax Treaty may reduce the amount of tax withheld from your payment. To claim this benefit, you must complete the Foreign National Information System, or FNIS, questionnaire. Review the FNIS Information Page for more details.

If your country has a Tax Treaty with the United States, the Additional Questions section will appear. Click the IU FNIS for Suppliers Site link located in this section to learn more about how to apply for Tax Treaty.

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.

A phone number must be associated with your 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. International phone numbers must begin with a “+”. Click Save Changes to save your work and exit the window.
A physical address is also required. This may be the same as your payment address, but it must be entered as its own entry. Click Add Address to add another entry.

Reminder: fields marked with a star are required. All other fields are optional.
Enter your physical address information and 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. 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. Your profile must contain at least two addresses: a remittance, or payment, address and a fulfillment, or physical, address.
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 or another individual 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.
Payment Information

Individuals may elect to receive payment via wire transfer or foreign draft. A wire transfer is an electronic transfer of money, commonly to a foreign bank account. A foreign draft is a paper check issued in a foreign currency. The paper check is printed at your local financial institution.

Click **Add Payment Information** and select your preferred method of payment.

You may enter multiple payment methods but may only have one active payment method.
Payment via Wire Transfer

Select **Wire Transfer** from the drop-down menu.

A new window opens where you can enter your payment details. The table below describes what information should be entered in each field.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payment Title</td>
<td>Enter “Wire Transfer” in this field.</td>
</tr>
<tr>
<td>Country</td>
<td>The country in which you reside.</td>
</tr>
<tr>
<td>Electronic Remittance Email</td>
<td>Enter an email address in this field if you wish to be notified when a payment is made using this information.</td>
</tr>
<tr>
<td>Currency</td>
<td>Select your preferred currency from the drop-down menu. <strong>If your preferred currency is not listed, choose USD.</strong> You can select from a broader list of options in the next step.</td>
</tr>
<tr>
<td>Contact Name</td>
<td>The name of the individual associated with this payment information.</td>
</tr>
<tr>
<td>Purpose</td>
<td>If you are entering multiple payment methods, include a description of the type of payments received via this method.</td>
</tr>
<tr>
<td>Active</td>
<td>Defaulted to “Yes.” Do not change this field.</td>
</tr>
<tr>
<td>Country</td>
<td>Select the country in which your bank is located from the drop-down menu.</td>
</tr>
<tr>
<td>Bank Name</td>
<td>Enter the name of your financial institution. Ensure the name entered here matches your institution’s full name. Discrepancies may result in delay of payment.</td>
</tr>
<tr>
<td>Account Holder’s Name</td>
<td>Full name of the individual to which the account belongs.</td>
</tr>
<tr>
<td>Account Type</td>
<td>Choose the appropriate option, Checking or Savings, from the drop-down menu.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>SWIFT/BIC</td>
<td>This information is provided by your financial institution and is used to transfer funds.</td>
</tr>
<tr>
<td>International Routing Code (IRC)</td>
<td>Some financial institutions use IRCs in combination with SWIFT/BIC codes. Contact your institution for details.</td>
</tr>
<tr>
<td>IBAN (International Bank Account Number)</td>
<td>This field may be required. This depends on the country in which your financial institution resides.</td>
</tr>
<tr>
<td>Confirm IBAN</td>
<td>Re-enter the IBAN number from the previous field to verify its accuracy.</td>
</tr>
<tr>
<td>Address fields</td>
<td>Enter the address of your financial institution, if desired.</td>
</tr>
</tbody>
</table>

Once all required fields are complete, click **Save Changes** to save your work.
Next, specify your preferred currency in the **Additional Questions** section from the **Wire Transfer Currency** drop-down menu.

In this example, we are requesting payment in Euros, so we will select “EUR – Euro” from the drop-down menu.

If your preferred currency is not listed, select USD – US Dollars.

If a Foreign Draft is the desired payment method, select a Foreign Draft Currency below. Please note that Wire Transfer is a faster and more secure payment method than Foreign Draft. If Foreign Draft is your required payment method your payment may be delayed by several weeks.
Next, confirm your payment method by selecting the radio button next to **Wire Transfer**. Once this option is selected, upload a copy of your wire transfer information by clicking **Select file**. Click **Save Changes** to save your work.

At the bottom of the **Payment Information** section, upload a supporting bank document that verifies the wire details you previously input. This is a document on bank or company letterhead indicating the account information of the payee. This should include **Swift code, account holders name, and account number or IBAN number depending on country**.

Click **Select File** under **Wire Attachment Upload**. An additional, **optional** field for intermediary bank information is also present.

After selecting and uploading your bank information document, Click **Save Changes**.

**A document verifying bank information is REQUIRED. If this is missing, the registration process will be delayed.**
Tax Information
A completed and signed W-8BEN tax form is required to complete registration. Click Add Tax Document and select W-8BEN.

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 *must have a REV date of 2018 or later*, click **Select file** to upload the document.

If you do not have a completed W-8BEN on hand, click **Download Pre-populated Tax Document**. Jaggaer generates a W-8BEN tax form which contains information previously entered during the registration process.

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.

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

Next, enter your foreign tax ID number in the **Foreign Tax Identifying Number** field and your date of birth in the **Birthdate** field. An example of a foreign tax ID number is the number you use to file taxes in your home country. This information should match what is reflected on the tax form you just uploaded.

The Foreign Tax Identifying Number and Birthdate fields are required for foreign-taxed individuals, even though they are not marked with a star.

Click **Save Changes** to save your progress and **Next** to continue to the last section of the registration process.
### Additional Questions

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Foreign Tax Identifying Number</td>
<td>789456123</td>
</tr>
<tr>
<td>Tax Form Signature Date</td>
<td>11/27/2019, 11:45:57 AM</td>
</tr>
<tr>
<td>Birthdate</td>
<td>03/05/1963, 11:45:57 AM</td>
</tr>
</tbody>
</table>
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.
After submission, you will 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 supplier@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.

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.