

# Registration Check List for Self-Governed Student Org (SGSO)

Please only provide tax and payment information for the SGSO you are registering for. <u>DO NOT ENTER PERSONAL TAX OR PAYMENT INFORMATION</u>. If you are not an SGSO, stop and notify <u>helpmeiu@iu.edu</u>.

#### **Getting Started:** Click here for Invitation directions

- All fields marked with a star [★] are required. Sections marked with an alert symbol [⚠] are incomplete. Sections marked with a green checkmark [√] are complete. Note that the Insurance and Supplier Information fields are pre-completed.

#### Welcome Section: Click here for Welcome instructions

Legal Company Name – This must be your SGSO's legal company name as provided to the IRS.

## **Company Overview Section:** Click here for Overview instructions

- o DBA: Any other names your SGSO may go by (optional). Country of Origin: Select 'United States'.
- Legal Structure: Select 'Other'.
- US Tax ID Number: Enter the SGSO's Employer Identification Number (EIN). You can find this number on the SS-4 form, provided by the IRS upon completion of EIN application.

#### Addresses Section: Click here for Addresses instructions

- Address Label: Label this the name of your SGSO.
- Complete all fields, including phone number.

#### **Contacts Section:** Click here for Contacts instructions

o You must enter at least one contact. This should be your group's contact information.

#### **Business Details:** Click here for Business Details instructions

Enter Commodity Code 'PRO36' on the Commodity Codes section of 'Products and Services'.

#### Payment Information Section: Click here for Payment Information instructions

- An SGSO is required to have an <u>ACH/Direct Deposit Payment Method</u>. The 'Account Holder Name' field must match the SGSO's legal name.
- o **Do not provide personal banking details.**
- Payment Title: This is a description for the payment type (e.g. "Check" or "PNC Bank ACH").
- Country: Select 'United States'.
- o Electronic Remittance Email (required for ACH): This email will receive payment notifications.
- Currency: Select 'USD'

#### Tax Information Section: Click here for Tax Information instructions

- A W-9 tax document is required.
  - After clicking 'Add Tax Document' > 'W-9', select 'Download Pre-populated Tax Document', review the document, save, then upload.
  - **Do not** upload any personal tax information.

### Certify & Submit Section: Click here for Certify & Submit instructions

- $\circ$  Once all sections are completed, and green checkmarks  $[\checkmark]$  are visible, you can Certify & Submit your registration.
  - If you see an alert symbol [⚠], the section is missing required information. Click on the section to review and complete.
- You <u>must</u> Certify & Submit your registration. Payment cannot be made until your registration is submitted.

You will receive a notification when your profile is approved. This **does not** mean payment has been issued. If you have questions about payments, contact the IU department you are doing business with.

SGSO Registration Check List Page 1 of 1 Last Updated: 03/10/2025