

Update W-8BEN Tax Forms

This guide demonstrates how to submit updated tax forms in your Jaggaer supplier portal for international individuals and entities.

Signed W-8BEN tax forms are valid for three years. To continue doing business with Indiana University, updated tax forms must be added to the supplier portal as soon as possible. Failure to update this information makes you ineligible to continue working with IU.

The Jaggaer portal is not accessible on mobile devices such as smartphones or tablets.

It must be accessed from a desktop computer.

Select the appropriate profile type below to view instructions for submitting an updated W-8BEN tax form.

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Instructions for Individuals

First, <u>login to your Jaggaer supplier portal</u>. Once logged in, click **Indiana University** in the **Customer Portal Access** section.

^		UPPLIER NETWORK			All 🔻	Search (Alt+Q)
íc Q	Create Invoice / C	edit Memo Invoice O Credit Memo	Import Invoice 7	Invoice Number(s)	be separated b	y a comma(,).
¥ ♂⊥ *	Invoice No. Invoice Date Customer PO Number Currency Customer Portal A	06/23/2021 mm/dd/yyyy Indiana University TEST SITE Optional PO Number US Dollar	Create	Need Assistance? Help Search for Browse the Table of Contents Training Online Training and Support Supplier Contact Name: Kathryn Janeway Title: Email: guidinglitedlite@gmail.com Phone: +49 351 8564574	۹	3
	Customer	Registration Status	Customer Contact	JAGGAER Support Still have questions? Contact Us 🕑		
	Indiana University	Complete	Indiana University View All Registrations	Benchmarking To learn more about SmartProcure, click here 🕑		?
Q,	Sourcing Events		? View All Events	Contracts No Results		?

On the next screen, click Manage Registration Profile located in the Quick Links section of the page.

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Home 🕨 Custom	er Portal Home			
Welcom	e to the Indiana	Quick Links to C	ommon Tasks	?
Universi	ty Supplier Portal	Manage Registration F	Profile	
We apprecia continued b For question	ate and look forward to our usiness relationship. 15. please contact us using	Sourcing Events		?
our Suppor	t Form.	Show	Opening or Closing Soon 🗸	Go to Public Opportunities
		No Results		
Custom	er Contact ?	No Results		
Name	Indiana University			View All Events
Title	Supplier Data Management			
Email	buyiu.noreply@iu.edu	Contracts		?
Phone	+1 812-855-3720	No Results		



Select **Tax Information** from the left-hand navigation.

			€ ~	1
	Registration Manage Registration	Profile		
io A	Janeway, Kathryn Supplier Number:u15381243		Welcome to Supplier Registration	?
*	Registration Complete for: Indiana University TEST SITE		Welcome to the Indiana University supplier portal! (TEST)	
P	Welcome		Thank you for doing business with us. Indiana University has made a major investment in redesigning ou for procuring goods and services. Our improvements will touch each step from quote, purchase order, de payment. Our implementation of JAGGAER, IU's electronic procurement system, will allow IU to easily soo	r process livery, and urce and
հղ	Individual Overview		If you already have an account or are a registered supplier that has been invited to do business with India	ana
8	Addresses	-	University, please log in with your username and email address.	
	Contacts	<	Maintain valid contact information	
	Payment Information	1	 Review the status of payments Update and review banking information 	
	Tax Information	~	riant Registration Information:	
			Please ensure that your legal name matches the legal name of the entity as listed on the tax form p	orovided to

On the Tax Information section page, click **Add Tax Document**, then select **W-8BEN**.

						0 🖻	Å 1
Registration Manage Registration Profile							
Janeway, Kathryn Supplier Number:u15381243	Tax Information						?
Registration Complete for: Indiana University TEST SITE	Tax Information is used for pa	ayment. Plea	se download prefilled fo	rm, review for accuracy,	sign and uplo	ad.	
Welcome	Tax Document Name ⊽	Тах Туре	Tax Document Year	Tax Documentation	e-Signed	Signature Status	
Individual Overview	k.janeway@gmail.com	W-8BEN	2019	Ł View Document	×	Not Signed	Edit 💌
Addresses 🗸	Add Tax Document 🔫						
Payment Information	W-8BEN						
Tax Information	Tax Form Signature Date *						
	11/27/2019						
Registration FAQ View History	ттт, аа, уууу						



A new window opens. Enter a name for the tax document in the **Tax Document Name** field. Select the year the W-8BEN was signed from the **Tax Document Year** drop-down menu. **Check the box** next to "Manually upload the document instead."

come		Edit Tax Docu	ment	×	ion	e-Signed	Signature Statu
vidual Overview	~					×	Not Signed
resses	~	Тах Туре 🕇	W-8BEN		+	*	Not Signad
itacts	~	Tax Document Name *	Janeway W-8BEN Updated		L	~	Not signed
ment Information	~	Tax Document Year	2021 🗸				
Information							
ration FAQ View History			Manually upload the document instead				
		* Required to Complete Registr	ation Save Changes Clo	ose			

New fields appear after checking the box. Visit the <u>IRS website to access a blank W-8BEN tax form</u> or click **Download Pre-populated Tax Document** and Jaggaer generates a W-8BEN form based on your supplier portal information.

Important tax form reminders:

- The name listed on the tax form must match the name used to register with the Jaggaer network.
- Tax forms must be signed and dated to be valid. This means the form must be printed, physically signed, then uploaded or signed using an electronic method such as Adobe Sign. Valid electronic signatures must contain the date and time of the signature. The image below is an example of an acceptable electronic signature.

 The person named on line 1 of this form is a resident of the treaty co the United States and that country, and 	untry listed on line 9 of the form (if any) within the meaning of the income tax treaty between				
For broker transactions or barter exchanges, the beneficial owner is	er transactions or barter exchanges, the beneficial owner is an exempt foreign person as defined in the instructions.				
Furthermore, I authorize this form to be provided to any withholding a any withholding agent that can disburse or make payments of the inc if any certification made on this form becomes incorrect.	agent that has control, receipt, or custody of the income of which I am the beneficial owner or come of which I am the beneficial owner. I agree that I will submit a new form within 30 days				
Sign Here Sarah Julia Chavez Di	gitally signed by Sarah Julia Chavez ite: 2021.06.23 00:17:45 -04'00'				
Sign Here Sarah Julia Chavez Di Signature of beneficial owner (or individual ad	gitally signed by Sarah Julia Chavez tte: 2021.06.23 00:17:45 -04'00' uthorized to sign for beneficial owner) Date (MM-DD-YYYY)				
Sign Here Sarah Julia Chavez Di Signature of beneficial owner (or individual au Print name of signer	gitally signed by Sarah Julia Chavez te: 2021.06.23 00:17:45 -04'00' Thorized to sign for beneficial owner) Date (MM-DD-YYYY) Capacity in which acting (if form is not signed by beneficial owner)				



Once your tax form is ready, click **Select file** and upload it to the portal. Click **Save Changes** to save your work.

Registration > Manage Reg	Add Tax Document	×	
Supplier Number:u15381. Registration Complete f Indiana University TEST	Tax Documentation Select file Drop file to attach, or provide to a	ء. ي	accuracy, sign and
Individual Overview	Janeway W-8BEN Updated.pdf 100%	×	Signature Status
Contacts	✓ I certify this tax document		
	* Required to Complete Registration Save Changes	Close	Save Changes

Finally, update the Additional Questions section. Enter the date the W-8BEN was signed in the **Tax Form Signature Date** and update the **Residency Type** field if necessary.

Click **Save Changes** to submit your edits for review by IU's Supplier Data Management (SDM) team. SDM will contact you if they have questions or need additional information.

Welcome		Tax Document Name ⊽	Tax Type	Tax Document Year	Tax Documentation	e-Signed	Signature Status	
Individual Overview	×	Janeway W-8BEN Updated	W-8BEN	2021	Ł View Document	 Image: A second s	e-Signed	Edit 🔻
Addresses	× .	k.janeway@gmail.com	W-8BEN	2019	▲ View Document	×	Not Signed	Edit 🔻
Contacts	× .	Add Tay Document 🖛						
Payment Information	× .							
Tax Information	~	Additional Questions	_					
Registration FAQ View History		06/23/2021						
		Birthdate 05/05/1963 mm/dd/yyyy	0					
		Residency Type *	~	9				
							Save Chang	ges



Instructions for Companies/Entities

First, <u>login to your Jaggaer supplier portal</u>. Once logged in, click **Indiana University** in the **Customer Portal Access** section.

	PLIER NETWORK		All ▼ Search (Alt+Q) Q	~ ► ↓
Home Supplier Portal Home				
Hawthorne Consume	r Products	?	<i>J∧GG∧=</i> ~•	
JAGGAER Network ID View Your Company's Networ Manage Customer Registratio	1001377964 k Profile		Find Invoice	?
Send New User Registration R	equest		To check payment status of an invoice or send a mess an invoice, please enter the invoice number then clici	Advanced Search sage to a customer regarding k the "Search" button.
Create Invoice / Cred	it Memo	Import Invoice ?	Invoice Number(s)	٩
A No customers have authoriz	ed invoice creation this suppl	ier.	Multiple values ca	n be separated by a comma(,
Customer Portal Acces	255	?	Need Assistance?	1
Customer	Registration Status	Customer Contact	Help Search for	Q
Indiana University	In Progress	Indiana University	Browse the Table of Contents	
		View All Registrations	Training	

On the next screen, click Manage Registration Profile located in the Quick Links section of the page.

If you do not have access to this part of the supplier portal you will need to request access from another member of your organization. Review the <u>Delegate Portal Access guide</u> for more information.

U INDIANA UNIVERSITY		0 ► 1
Home Customer Portal Home		
Welcome to the Indiana University Supplier Portal	Quick Links to Common Tasks Manage Registration Profile	?
We appreciate and look forward to our continued business relationship. For questions, please contact us using our Support Form.	Show Opening or Closing Soon	? Go to Public Opportunities
Customer Contact ?	No Results No Results	
Name Indiana University		View All Events
Title Supplier Data Management	Contracts	2
Phone +1 812-855-3720	No Results	



Select **Tax Information** from the left-hand navigation.

U INDIANA UNIVERSITY	€ ► 41
Registration Manage Registration Profile	
Hawthorne Consumer Products	Welcome to Supplier Registration ?
Registration In Progress for: <i>Indiana University TEST SITE</i> 2 of 8 Steps Complete	Welcome to the Indiana University Supplier Portal (TEST) 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.
Welcome	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.
Company Overview	Registered suppliers with active login information will be able to:
Business Details	Upload and maintain valid contact, account, and insurance documentation Receive real-time electronic delivery of purchase orders Submit electronic quotes
Addresses 🗸	Quickly and easily submit invoices Review payment status
Contacts 🗸	Upload and update catalogs
Insurance 🗸	Important Registration Information
Payment Information	Please ensure that your legal name matches the legal name of the entity listed on the tax forms you provide us.
Tax Information	t Indiana University Office of Procurement Services via our Support Form, or by at 812.855.3720.
Supplier Information	~

On the Tax Information section page, click **Add Tax Document**, then select the appropriate tax form. The most common form is the **W-8BEN-E**.

							0 F	Å 1
Registration Manage Registration F	Profile							
Hawthorne Consumer Products		Tax Information						?
Registration In Progress for: Indiana University TEST SITE 3 of 8 Steps Complete		Tax information is used for p	payment and t	he tax document should	be uploaded using a PDF	format.		
Welcome		Tax Document Name 🗢	Тах Туре	Tax Document Year	Tax Documentation	e-Signed	Signature Status	
Company Overview	~	W-8BEN-E 2019	W-8BEN-E	2019	Ł View Document		e-Signed	Edit 💌
Business Details	~	Add Tax Document 🗢						
Addresses	~	W-8BEN W-8BEN-E						
Contacts	~	W-8ECI						
Insurance	1	W-8EXP	1111					
Payment Information	~	W-8IMY						
Tax Information	~							



A new window opens. Enter a name for the tax document in the Tax Document Name field. Select the year the W-8BEN was signed from the Tax Document Year drop-down menu. Check the box next to "Manually upload the document instead."

versity TEST SITE		Tux information to used for puji	ment and the tax document should be aproduce	using (ionnat.	
ps Complete		Add Tax Docu	ment	×	on	e-Signed	Signature Sta
Overview	~	Тах Туре ★	W-8BEN-E		t	*	e-Signed
Details	~	Tax Document Name *	Hawthorne W-8BEN-E Updated				
\$	~	Tax Document Year *	2021 ~				
	~						
	×						
nformation	× .		Manually unload the document instead				
nation	×						
formation	 Image: A second s						
ubmit		* Required to Complete Registra	ation Save Changes Clo	se			

New fields appear after checking the box. Visit the W-8BEN-E page on the Controller's Office website to access abbreviated versions of the W-8BEN form based on your country and business activity.

Alternatively, click Download Pre-populated Tax Document and Jaggaer generates a W-8BEN form based on your supplier portal information.

Important tax form reminders:

- The name listed on the tax form must match the name used to register with the Jaggaer network. .
- Tax forms must be signed and dated to be valid. This means the form must be printed, physically signed, then uploaded or signed using an electronic method such as Adobe Sign. Valid electronic signatures must contain the date and time of the signature. The image below is an example of an acceptable electronic signature.

Part XXX Certification			
Under penalties of perjury, I declare that I have examined the penalties of perjury that:	information on this form and to the best of my knowledge and	d belief it is true, correct, and co	omplete. I further certify under
 The entity identified on line 1 of this form is the benefi purposes, or is a merchant submitting this form for purpose 	cial owner of all the income to which this form relates, is es of section 6050W,	using this form to certify its	status for chapter 4
 The entity identified on line 1 of this form is not a U.S. personal 	on,		
 The income to which this form relates is: (a) not effectively an income tax treaty, or (c) the partner's share of a partner. For broker transactions or barter exchanges, the beneficial 	connected with the conduct of a trade or business in the Unite ship's effectively connected income, and owner is an exempt foreign person as defined in the instructio	d States, (b) effectively connec ns.	ted but is not subject to tax under
Furthermore, I authorize this form to be provided to any with or any withholding agent that can disburse or make payme	holding agent that has control, receipt, or custody of the incor nts of the income of which the entity on line 1 is the benefici	ne of which the entity on line 1 al owner.	is the beneficial owner.
I agree that I will submit a new form within 30 days if any cer	tification on this form becomes incorrect.		
Sign Here Contract Co	IRED 🖌	-REQUIRED	
Signature of individual auth	orized to sign for beneficial owner	Print Name	Date (MM-DD-YYYY)
I certify that I have the capac	ity to sign for the entity identified on line 1 of this form.		
Note: Lines in this substitute form are numbered to REQUIRE	match the official IRS form. Refer to IRS instructio	ns for Form W-8BEN-E w	hen completing this form.
Ipdate W-8BEN Tax Forms	Page 8	L	ast Updated: 6/25/202



Once your tax form is ready, click **Select file** and upload it to the portal. Click **Save Changes** to save your work.

Registration Manage Registration Profile Hawthorne Consumer	Add Tax Docu	ment	×	
Products Registration In Progress for: Indiana University TEST SITE 3 of 8 Steps Complete	Tax Documentation *	Select file Prop file to attach, or prowse.	ormat.	
Welcome Company Overview		Hawthorne W-88EN-E Updated.pdf 🛃 100%×	e-Signed	e-Signed Edit
	* Required to Complete Registra	ation Save Changes C	lose	Next > Save Change:

Finally, update the Tax Form Signature Date in the Additional Questions section. Enter the date the W-8BEN was signed in the field.

Click **Save Changes** to submit your edits for review by IU's Supplier Data Management (SDM) team. SDM will contact you if they have questions or need additional information.

Hawthorne Consumer Products Registration In Progress for: Indiana University TEST SITE		Tax Information						?
		Tax information is used for payment and the tax document should be uploaded using a PDF format.						
3 OT 8 Steps Complete							.	
Welcome		Tax Document Name V	lax Type	lax Document Year	lax Documentation	e-Signed	Signature Status	
Company Overview	1	Hawthorne W-8BEN-E Updated	W-8BEN-E	2021	Ł View Document	*	e-Signed	Edit 🔻
Business Details		W-8BEN-E 2019	W-8BEN-E	2019	Ł View Document	~	e-Signed	Edit 💌
Addresses	~	Add Tax Document 🗢						
Contacts	× .	Additional Questions						
Insurance	<	Tax Form Signature Date *						
Payment Information	× .	06/23/2021						
Tax Information	 Image: A second s	mm/dd/yyyy						
Supplier Information								
Certify & Submit								
Registration FAQ View History							Save	Changes