

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, [login to your Jaggaer supplier portal](#). Once logged in, click **Indiana University** in the **Customer Portal Access** section.

JAGGAER SUPPLIER NETWORK

Home ▶ Supplier Portal Home

Create Invoice / Credit Memo [Import Invoice](#) ?

Type: Invoice Credit Memo

Invoice No.

Invoice Date: 06/23/2021 mm/dd/yyyy

Customer: Indiana University TEST SITE

PO Number: Optional PO Number

Currency: US Dollar

Customer Portal Access ?

Customer	Registration Status	Customer Contact
Indiana University	Complete	Indiana University

[View All Registrations](#)

Sourcing Events ?

No Results [View All Events](#)

Need Assistance? ?

Invoice: please enter the invoice number then click the "Search" button.

Invoice Number(s) Multiple values can be separated by a comma(,).

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

JAGGAER Support

Still have questions? [Contact Us](#)

Benchmarking ?

To learn more about SmartProcure, [click here](#)

Contracts ?

No Results

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

INDIANA UNIVERSITY

Home ▶ Customer Portal Home

Welcome to the Indiana University Supplier Portal

We appreciate and look forward to our continued business relationship.

For questions, please contact us using our [Support Form](#).

Customer Contact ?

Name: Indiana University
Title: Supplier Data Management
Email: buyiu.noreply@iu.edu
Phone: +1 812-855-3720

Quick Links to Common Tasks ?

[Manage Registration Profile](#)

Sourcing Events ?

Show: Opening or Closing Soon

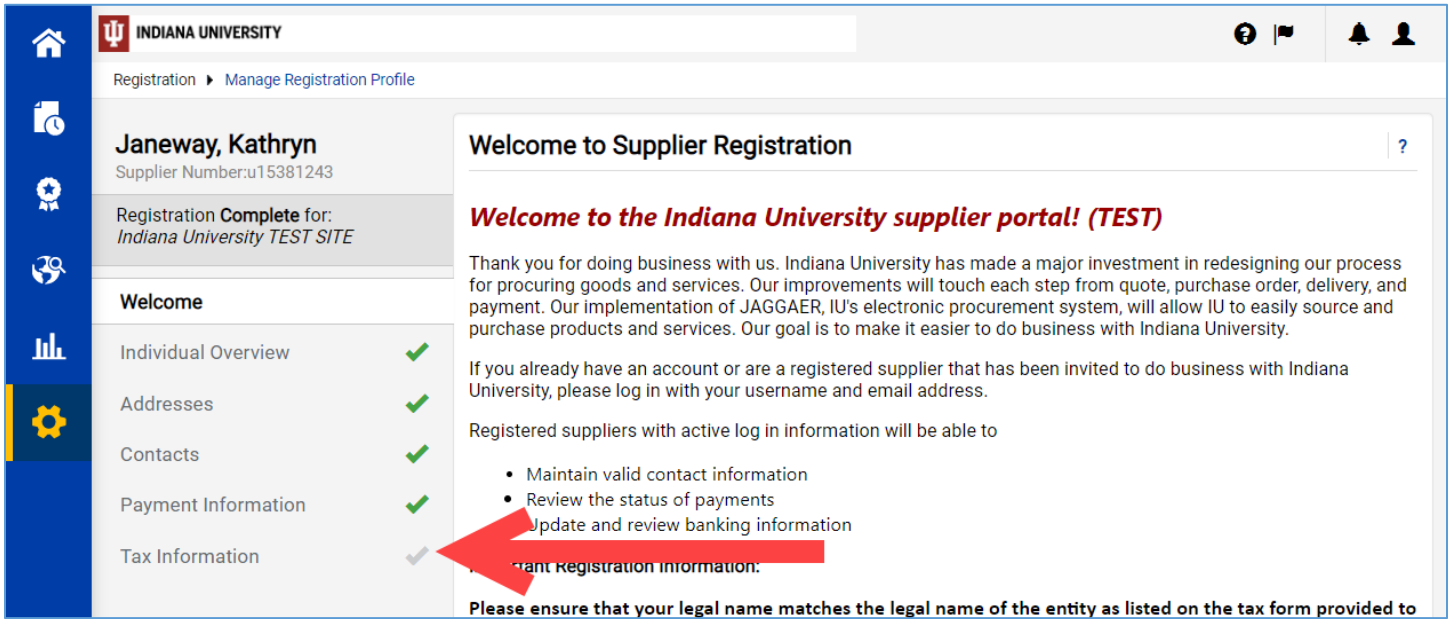
No Results
No Results

[View All Events](#)

Contracts ?

No Results

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



INDIANA UNIVERSITY

Registration ▶ Manage Registration Profile

Janeway, Kathryn
Supplier Number:u15381243

Registration **Complete** for:
Indiana University TEST SITE

Welcome

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

Welcome to Supplier Registration

Welcome to the Indiana University supplier portal! (TEST)

Thank you for doing business with us. Indiana University has made a major investment in redesigning our process for procuring goods and services. Our improvements will touch each step from quote, purchase order, delivery, and payment. Our implementation of JAGGAER, IU's electronic procurement system, will allow IU to easily source and purchase products and services. Our goal is to make it easier to do business with Indiana University.

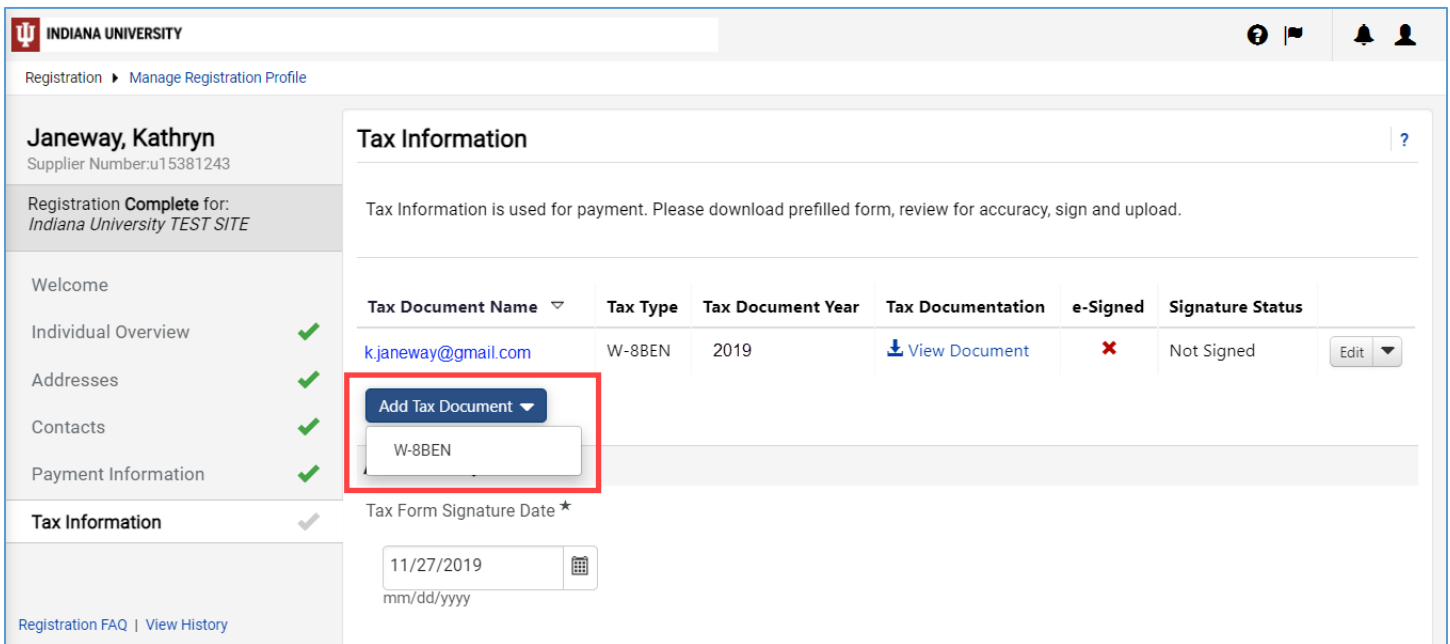
If you already have an account or are a registered supplier that has been invited to do business with Indiana University, please log in with your username and email address.

Registered suppliers with active log in information will be able to

- Maintain valid contact information
- Review the status of payments
- Update and review banking information
- Update and review registration information.

Please ensure that your legal name matches the legal name of the entity as listed on the tax form provided to

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



INDIANA UNIVERSITY

Registration ▶ Manage Registration Profile

Janeway, Kathryn
Supplier Number:u15381243

Registration **Complete** for:
Indiana University TEST SITE

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.

Tax Document Name	Tax Type	Tax Document Year	Tax Documentation	e-Signed	Signature Status
k.janeway@gmail.com	W-8BEN	2019	View Document	✗	Not Signed

Add Tax Document

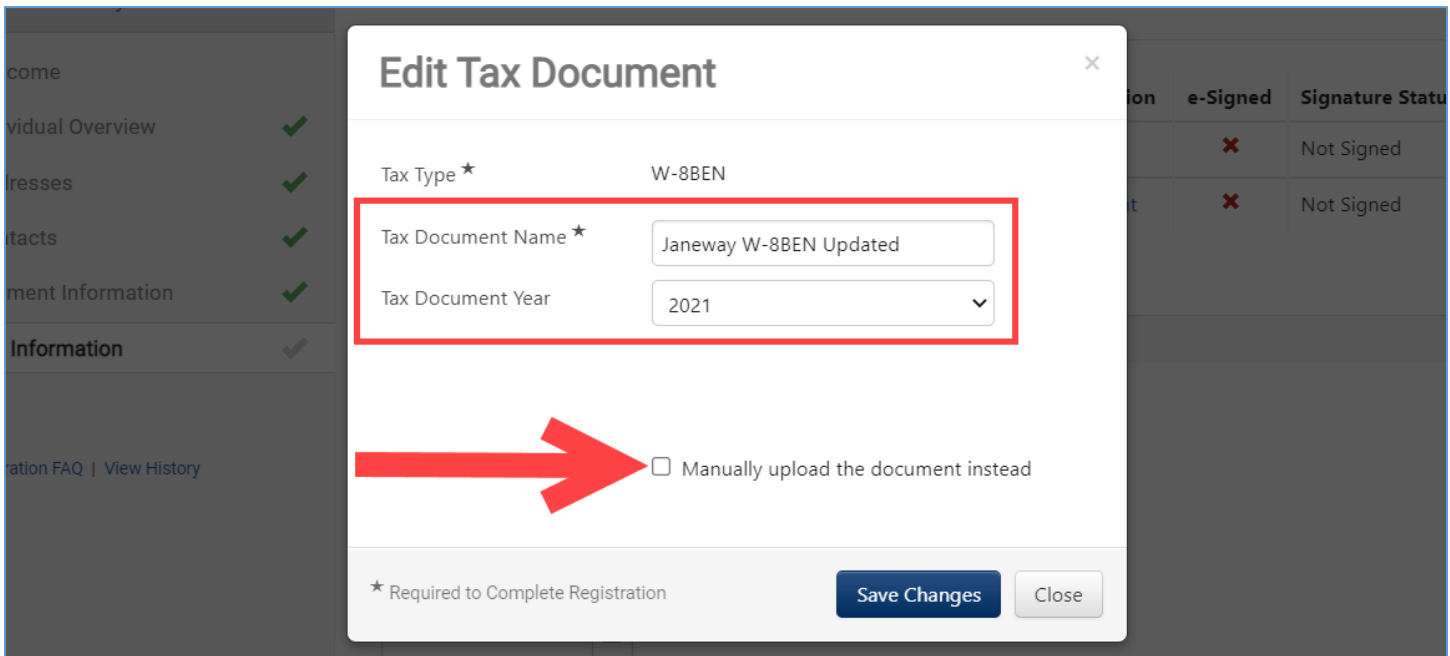
W-8BEN

Tax Form Signature Date *

11/27/2019

mm/dd/yyyy

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.”



New fields appear after checking the box. Visit the [IRS website to access a blank W-8BEN tax form](#) 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 country listed on line 9 of the form (if any) within the meaning of the income tax treaty between the United States and that country, and

• For broker 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 agent that has control, receipt, or custody of the income of which I am the beneficial owner or any withholding agent that can disburse or make payments of the income of which I am the beneficial owner. **I agree that I will submit a new form within 30 days if any certification made on this form becomes incorrect.**

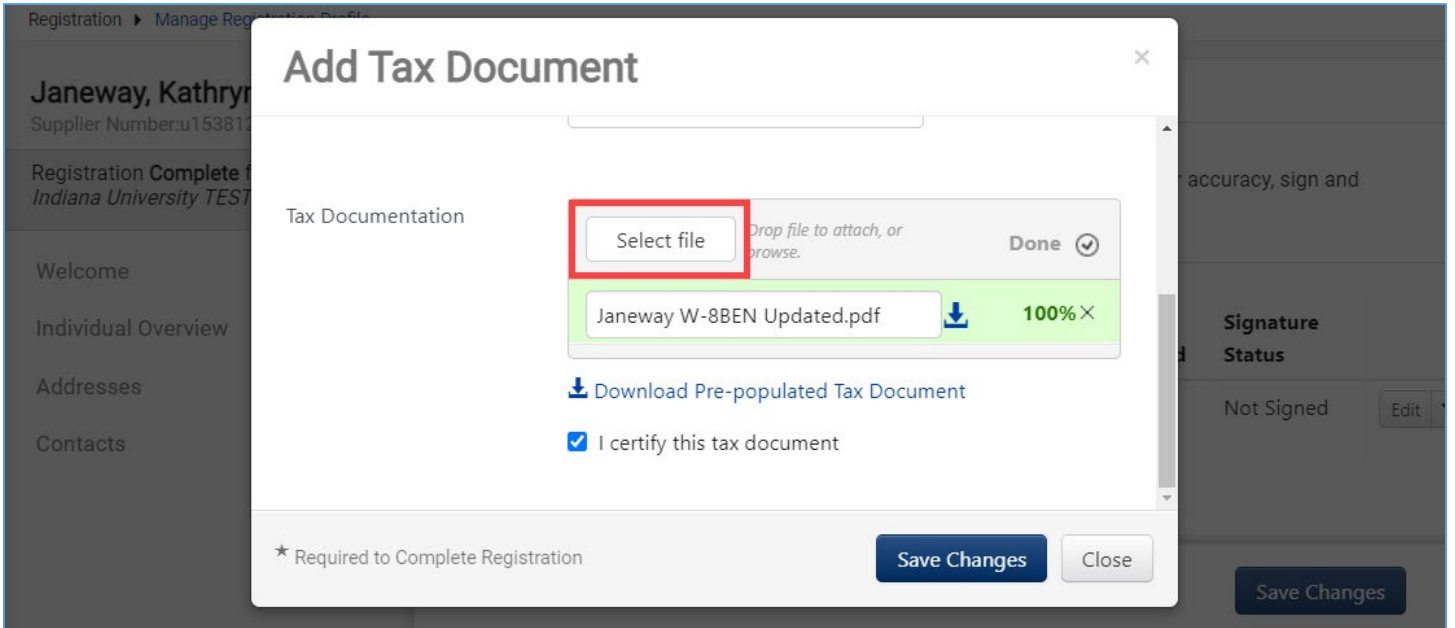
Sign Here  **Sarah Julia Chavez** Digitally signed by Sarah Julia Chavez
 Date: 2021.06.23 00:17:45 -04'00'

Signature of beneficial owner (or individual authorized to sign for beneficial owner) Date (MM-DD-YYYY)

Print name of signer Capacity in which acting (if form is not signed by beneficial owner)

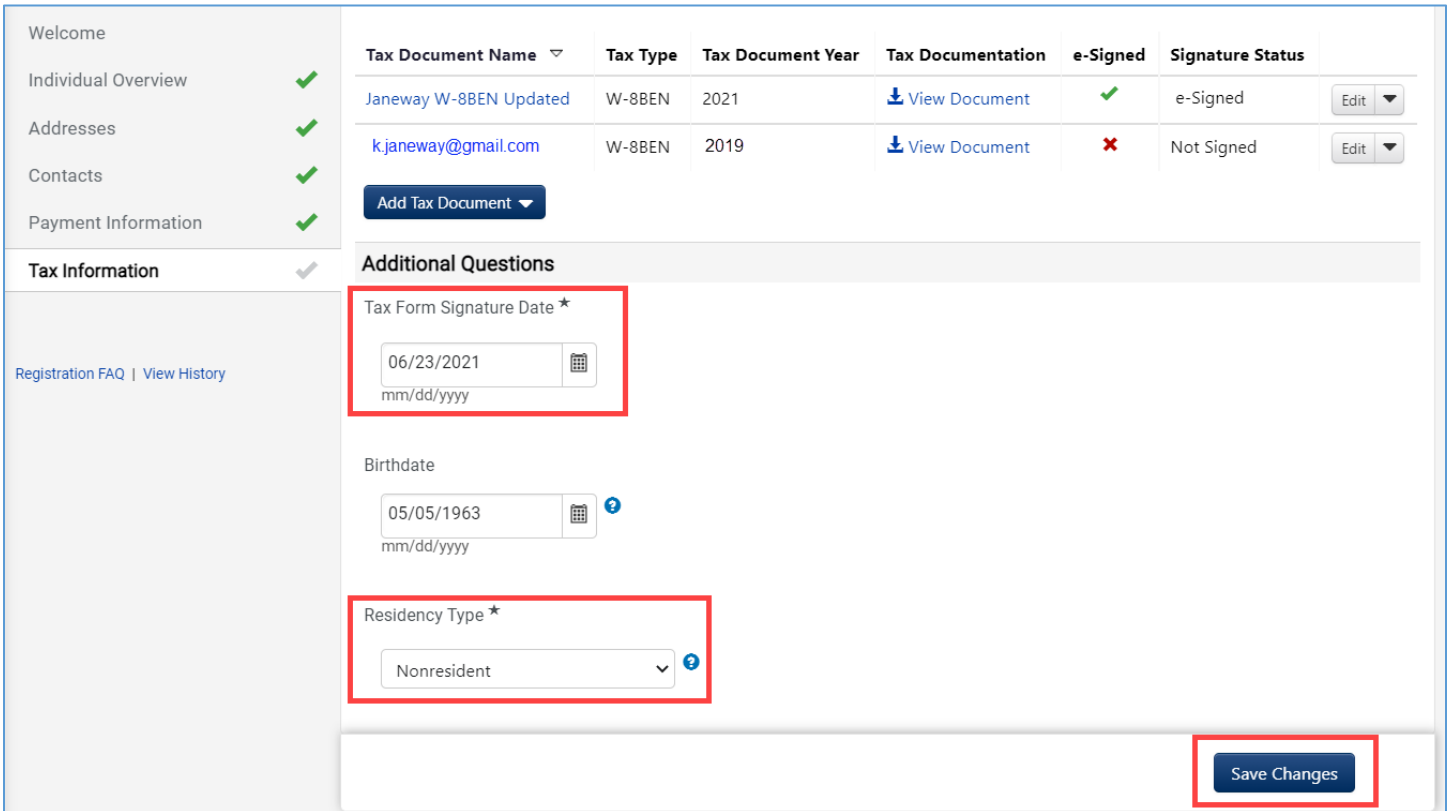
For Paperwork Reduction Act Notice, see separate instructions. Cat. No. 25047Z Form **W-8BEN** (Rev. 7-2017)

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



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.



Instructions for Companies/Entities

First, [login to your Jaggaer supplier portal](#). Once logged in, click **Indiana University** in the **Customer Portal Access** section.

The screenshot shows the 'JAGGAER SUPPLIER NETWORK' interface. A red arrow points to the 'Indiana University' entry in the 'Customer Portal Access' table.

Customer	Registration Status	Customer Contact
Indiana University	In Progress	Indiana University

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 [Delegate Portal Access guide](#) for more information.

The screenshot shows the 'INDIANA UNIVERSITY' Customer Portal Home. The 'Manage Registration Profile' link in the 'Quick Links to Common Tasks' section is highlighted with a red box.

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

WELCOME TO SUPPLIER REGISTRATION

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.

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. For more information, contact the Indiana University Office of Procurement Services via our [Support Form](#), or by phone at 812.855.3720.

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**.

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	e-Signed	Signature Status
W-8BEN-E 2019	W-8BEN-E	2019	View Document	✓	e-Signed

Add Tax Document

- W-8BEN
- W-8BEN-E
- W-8ECI
- W-8EXP
- W-8IMY

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.”

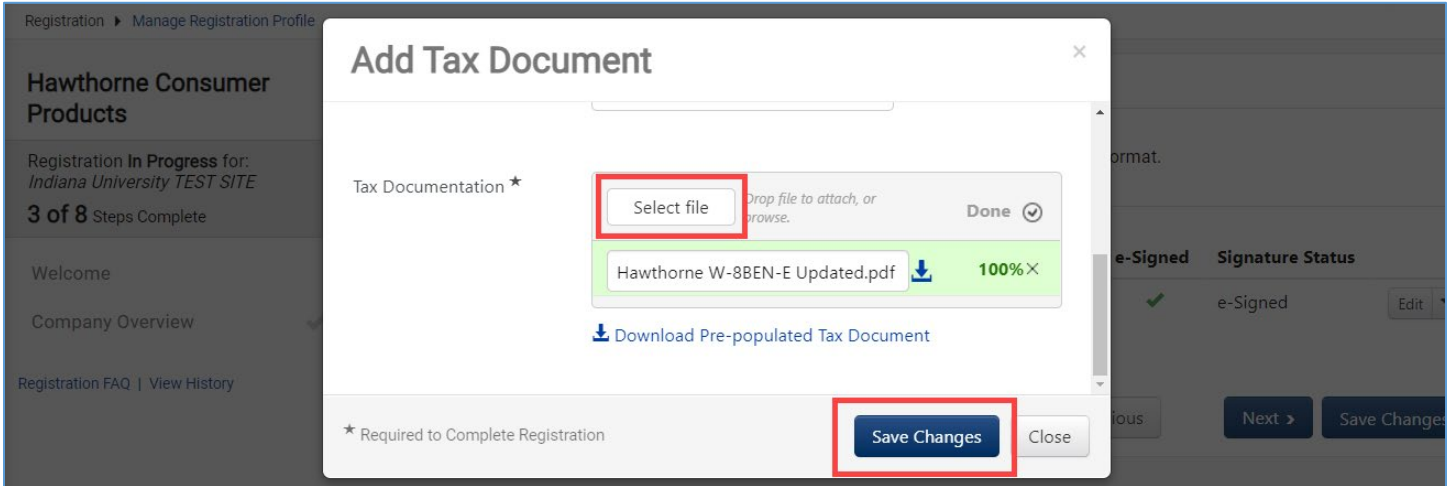
New fields appear after checking the box. Visit the [W-8BEN-E page on the Controller’s Office website](#) to access abbreviated versions of the W-8BEN form based on your country and business activity.

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.

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



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.

