

## Indiana University Office of Procurement Services

### STANDARD OPERATING PROCEDURE

<b>SOP NO:</b>	SOP-PURCH-31
<b>SUBJECT:</b>	Expired W8 Supplier Maintenance
<b>SOURCE:</b>	University Procurement Services
<b>ORIGINAL DATE OF ISSUE:</b>	08/4/2021
<b>DATE OF LAST REVISION:</b>	N/A
<b>DISCLAIMER:</b>	The information provided in this Standard Operating Procedure (SOP) is designed to provide helpful information on this procedure. Purchasing reserves the right to determine on a case by case basis if a SOP should be adjusted for a particular situation. This SOP is not intended to cover each and every situation nor can it anticipate specific circumstances.
<b>RATIONALE:</b>	W-8BEN tax forms expire 3 years from the signature date on the form. Once expired, IU should no longer purchase from the supplier.
<b>PROCEDURES:</b>	<p>Supplier Data Management (SDM) runs a quarterly report on expired W-8BENs.</p> <p><u>Registered suppliers</u></p> <ul style="list-style-type: none"> <li>• An email communication is sent via Salesforce to the email addresses on file instructing them to provide a new W-8.</li> <li>• Email communication examples for companies and individuals are available in the appendices below.</li> </ul> <p><u>Proxy or unregistered suppliers</u></p> <ul style="list-style-type: none"> <li>• SDM searches for Open and Unmatched POs against the supplier             <ul style="list-style-type: none"> <li>○ The PO initiator is informed via a comment that the supplier account will be deactivated due to outdated tax forms and an invitation is required before the profile can be used again.</li> </ul> </li> <li>• The supplier record is deactivated and rejected with a note similar to “Supplier has an outdated W-8. Supplier profile has been deactivated. If needed in the future, use a supplier edit form to invite the supplier to register and provide needed tax documents.”</li> </ul> <p><u>IU Press/IU Library classified suppliers</u></p> <ul style="list-style-type: none"> <li>• SDM filters out suppliers classified as IU Press/IU Libraries and sends the list of those records to the department contact.</li> <li>• IU Press and IU Library will contact the supplier to request new tax forms.</li> </ul>
<b>DEFINITIONS:</b>	
<b>CROSS REFERENCE:</b>	UCO Tax website with W-8BEN resources: <a href="https://controller.iu.edu/services/suppliers/w-8ben-e-forms">https://controller.iu.edu/services/suppliers/w-8ben-e-forms</a>



Office of Procurement Services

## Supplier Data Management

Greetings,

You are receiving this message because you are a supplier of Indiana University and your W-8BEN tax form has expired. Please log into your supplier portal and upload a new tax form as soon as possible.

[Click here to access a step-by-step guide for updating your tax form.](#) W-8BEN tax forms must be signed and dated to be valid.

If no action is taken within 30 days of receipt of this notice your record will be deactivated. You will not be able to work with IU until tax information has been updated.

[Login to your supplier portal](#)

If you are having issues accessing your account, please contact Jaggaer Customer Service at 1 (800) 233-1121 or via the [Jaggaer support form](#). Indiana University cannot reset your password.

For general questions or help uploading an updated tax form, contact the Supplier Data Management (SDM) team by submitting a [Support Form](#).

Thank you,  
Indiana University, Office of Procurement Services



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