Supplier Onboarding – Domestic Individual

Indiana University (IU) is a member of the Jaggaer supplier network. In order 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.

This document provides a step-by-step walkthrough of the supplier onboarding process for a US-taxed individual.

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

- Indiana University supplier invitation email.
- Optional, but encouraged, direct deposit (ACH) banking information.
- Optional, scanned image of completed and signed W-9 tax form.

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. Click the drop-down in the upper right-hand corner to select a 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. Update your time zone if needed.
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 the supplier portal.

**Complete and Submit Registration Information**

The supplier registration page is made up 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. At any time, click Save Progress to save your work and return at a later time.

Individual Overview

In the Individual Overview section, verify your Country of Origin. As a US-taxed person this should state “United States.”
Next, select your legal structure from the **Legal Structure** drop-down menu. Unless you have an established business, select “**Individual/Sole Proprietor**.”

A new drop-down menu appears which allows you to enter your **Tax ID Number Type**. Select the appropriate option. In the case of an Individual/Sole Proprietor, select “**Social Security Number**.”

Enter your social security number in the **Tax ID Number** field. Click **Save Changes** to save your work and **Next** to complete the Individual Overview section.

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. The remit address reflects where paper checks will be mailed.

A phone number must be associated with each 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. Click **Save Changes** to save your work and exit the window.
Additional addresses are not required, however you may wish to add another remit address, or a physical/tax address. Click **Add Address** to add another entry. Click here if you do not wish to add another address.

Reminder: fields marked with a star are required. All other fields are optional.

Click **Next** to continue to step 2.
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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.

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 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

US-taxed individuals may elect to receive payment via direct deposit, also known as ACH, or paper check. In either case, click **Add Payment Information** and select your preferred method of payment. Paper checks will be mailed to the remit address entered earlier in the registration process.

You may enter multiple payment methods but may only have one active payment method.
Payment via Direct Deposit (ACH)

Select Direct Deposit (ACH) from the drop-down menu. A new window opens where you can enter your banking information.

Reminder: fields marked with a star are required. All other fields are optional.

If you wish to receive an email notification when payment is issued via this method, enter your email address in the Electronic Remittance Email field.
Next, enter your bank account information in the **Bank Account** section. Click the **What is this?** link for help locating your routing and account numbers.

Routing and account numbers are not the same as a debit or credit card number.

Click **Save Changes** to save your work.
Payment via Check

Select **Check** from the drop-down menu. A new window opens to collect additional payment details.

Reminder: fields marked with a star are required. All other fields are optional.

If you wish to receive an email notification when payment is issued via this method, enter your email address in the **Electronic Remittance Email** field. Click **Save Changes** to save your work.
Once payment information is entered, click **Next**.

### Tax Information

A completed and signed W-9 tax form is required to complete registration. Click **Add Tax Document** and select **W-9**.

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, click **Select file** to upload the document.

If you do not have a completed W-9 form on hand, click **Download Pre-populated Tax Document**. Jaggaer generates a W-9 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 form was signed in the **Tax Form Signature Date** field. You may also select the date using the calendar widget to the right of the field.

Click **Save Changes** to save your progress and **Next** to continue to the last section of the registration process.
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 the statement of attestation and click Submit.
After submission, you will see a confirmation screen like the one below.

![Confirmation Screen](image.png)

Additionally, you will receive an email confirming your submission.

![Confirmation Email](image.png)
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.