

Supplier Experience - Individual

This guide outlines the registration process for Individuals to register as a Supplier



HARVARD
UNIVERSITY

Supplier Invitation from Harvard University

Hello Test Individual,

Harvard University has invited you to join our Supplier Portal hosted by JAGGAER.

Becoming a Harvard University registered supplier is free, and it only takes a few minutes to sign-up.

To start, select the "Register Now" button below, you will be routed to a secure website to complete the registration process. You must complete all required fields and click the *Certify and Submit* button on the last tab.



Do not forward this email to another email account. You can add additional contacts or emails while registering.

Note: International payees (inside & outside the U.S.)

- If you are required to provide additional tax information, you will receive a separate login email from Harvard's tax determination system inviting you to complete a profile.
- For additional information, visit: <https://nratax.oc.finance.harvard.edu/>

For technical support related to issues logging into the portal, adding attachments, browser errors, or other technical problems, please contact Jaggaer customer support at <https://www.jaggaer.com/service-support/supplier-support/>.

For Harvard specific support, including attaching appropriate documentation or completing registration information, contact Customer Contact Phone or ap_supplieronboarding@harvard.edu.

Harvard University

Message sent to: [] at [redacted]@gmail.com

Overview:

- Individuals will be invited by Harvard University using the Buy-to-Pay (B2P) system.
- Upon invitation, an email is sent to the supplier from ap_supplieronboarding@harvard.edu
- To start the registration process, supplier should **Click on the "Register Now"** button.

Note to all suppliers:

- If you do not receive the invitation to register email – please check your spam folder.
- The email invitation contains a *unique* link allowing you to begin the registration process.
- Recommended Browsers are Chrome or Firefox

Note for International payees (inside & outside the US):

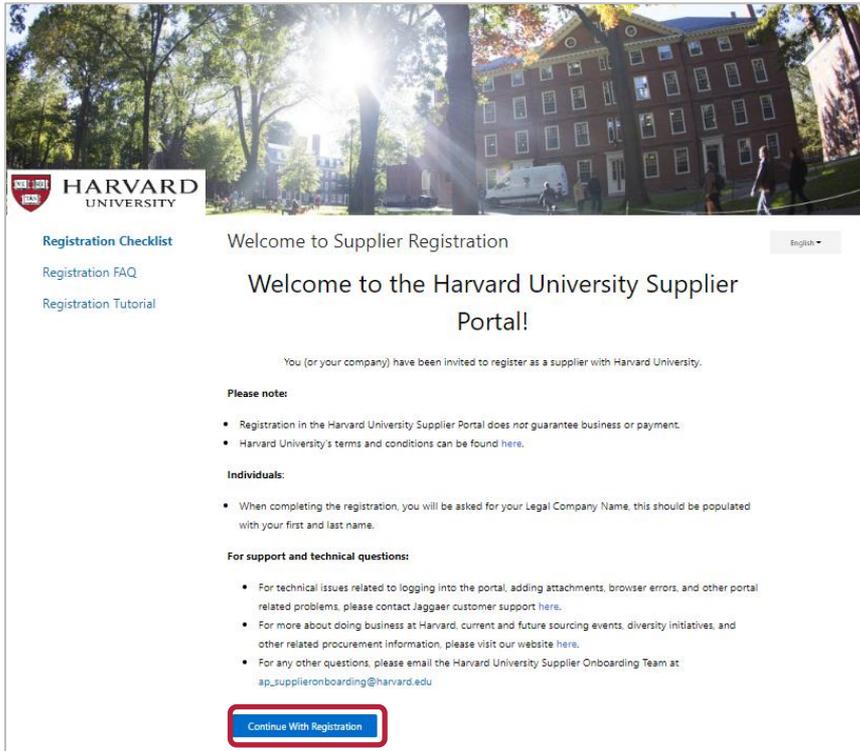
- If you are required to provide additional tax information, you will receive a separate login email from Harvard's tax determination system inviting you to complete a profile. This email will be sent *after* you have completed the B2P registration process.
- For additional information related to tax compliance, visit: <https://nratax.oc.finance.harvard.edu>

IMPORTANT: After all required sections are complete, be sure to click the "Certify and Submit" button.

Starting the Registration process:

The registration page is where you create a new user account.

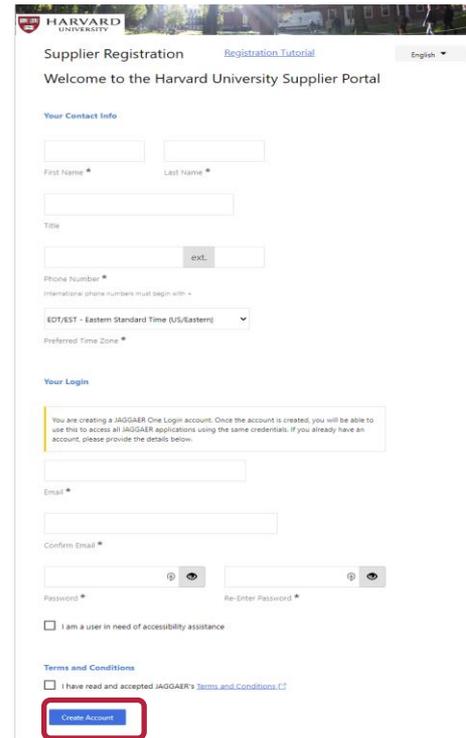
Select **Continue with Registration**



The screenshot shows the 'Welcome to Supplier Registration' page for Harvard University. The header includes the Harvard University logo and a navigation menu with 'Registration Checklist', 'Registration FAQ', and 'Registration Tutorial'. The main heading is 'Welcome to the Harvard University Supplier Portal!'. Below this, a message states: 'You (or your company) have been invited to register as a supplier with Harvard University.' There are three sections: 'Please note' with two bullet points, 'Individuals' with one bullet point, and 'For support and technical questions:' with three bullet points. A blue button labeled 'Continue With Registration' is highlighted with a red box at the bottom right.

On the Welcome page:

1. Enter your contact and login information
2. Accept terms and conditions
3. Click the Create Account button
4. Login with password
5. Follow on screen instructions for OTP provider (one time password)



The screenshot shows the 'Supplier Registration' page, 'Welcome to the Harvard University Supplier Portal'. The 'Your Contact Info' section includes fields for First Name, Last Name, Title, Phone Number, and Preferred Time Zone. The 'Your Login' section includes a message about creating a JAGGAER One Login account, followed by fields for Email, Confirm Email, Password, and Re-Enter Password. There is a checkbox for 'I am a user in need of accessibility assistance' and a 'Terms and Conditions' section with a checkbox for 'I have read and accepted JAGGAER's Terms and Conditions'. A blue button labeled 'Create Account' is highlighted with a red box at the bottom.



The screenshot shows the 'OTP Provider' selection screen. It features a dropdown menu with 'Email' selected, and a 'Select' button highlighted with a red box. There are also 'Back to Login' and 'Select' buttons.

Company Overview

(This section is called "Company" even if an Individual is registering)

The next page should look like the image below.

If you do not see this screen – please contact the Supplier Onboarding team (ap_supplieronboarding@harvard.edu)

Test Registration
Change Supplier

Registration In Progress for:
Harvard University

0 of 5 Steps Complete

Welcome

Company Overview ✓

Addresses ✓

Contacts ✓

Tax Information ✓

Payment Information ✓

Certify & Submit

Registration FAQ | View History

Company Overview

Note: US Citizens or permanent residents select "Individual/Sole Proprietor", Foreign Individuals/non-US payees select "Foreign Individual", Foreign Entities select "Non-US Based Entity".

Be sure to provide the appropriate Legal Structure information as it is currently stated with the IRS on your tax documents.

Please use the 9-digit format only. If you have a Foreign Tax ID, navigate to the Tax Information section and enter it in the applicable field.

Legal Structure *

US Tax ID Number (SSN/TIN)

HUID

Additional Questions

Legal Structure *
Tax ID Number Type ⓘ
Please use the 9-digit format
US Tax ID Number (SSN/TIN) *
Additional Questions
HUID

Individual/Sole Proprietor
C Corporation
S Corporation
Partnership
Trust/Estate
Limited Liability Company - C Corporation
Limited Liability Company - S Corporation
Limited Liability Company - Partnership
Other
Non-US Based Entity
Foreign Individual

★ Required to Complete Registration

Click **Save Changes** and then **Next** at the end of each section

Previous Next Save Changes

US Citizens or permanent residents (including Green Card Holders)

1. Select **Legal Structure** "Individual/Sole Proprietor"
2. Enter your Tax ID number; either SSN or Employer Identification Number, use the 9-digit format.
3. If you have a HUID, include it.

PLEASE NOTE: Permanent Resident (Green Card Holders) will need to upload a copy of resident card in "Tax Information" section.

Foreign individuals/Non-US payees

1. Select **Legal Structure** "Foreign Individual"
2. *Do not* enter a Non-U.S. Tax ID here - If you have a Foreign Tax ID, navigate to the "Tax Information" section and enter it in the Foreign Tax Identification Number field.
3. If you have a HUID, include it.

Address

Provide **two addresses**:

- **Fulfillment** (the tax reporting address)
- **Remittance** (address where a payment is sent)

Please note:

- Foreign individuals must enter a foreign address in Fulfillment address field. <https://nratax.oc.finance.harvard.edu/contact-nra-office>

- Click **Add Address**

Test Registration

Registration **In Progress** for:
Harvard University
2 of 6 Steps Complete

Welcome

Company Overview ✓

Addresses ⚠

Contacts ⚠

Tax Information ✓

Payment Information ⚠

Additional International In... ⚠

Certify & Submit

Addresses

- Scroll to the bottom of the page and click the *Add Address* button to add or edit an address.
- De-activate an existing address by clicking the arrow down next to "Edit" > Select "Make Inactive".
- Do not use "edit" button to update old address, instead "add new".
- **Fulfillment Address** – Where orders and/or tax documents may be sent
- **Remittance Address** – Where your payment may be sent
- [Click here](#) to find the 9-digit ZIP code for a US address

Required Information

The following address types are required to complete registration:

- **Fulfillment**
- **Remittance**

No addresses have been entered

Add Address

- Enter **label for address** (ex: home, office)

Add Address

Basic Information (Step 1 of 3)

What would you like to label this address? *

Example: Headquarters, Houston Office

Which of the following business activities take place at this address? (select all that apply) *

Takes Orders (fulfillment)

Receives Payment (remittance)

* Required to Complete Registration

Next

- Enter **Address Details**

- **Select Mail** from the dropdown field, "How would you like to receive purchase orders for this fulfillment address?"
- Select **Country**
- Complete all required fields (marked with an *)

Add Address

Address Details (Step 2 of 3)

How would you like to receive purchase orders for this fulfillment address?

Country *

Address Line 1 *

Address Line 2

- If providing a PO BOX, use **Add Address** to also include your legal address as a separate address

Address Label

⚠ legal address

Address Types

Remittance
Fulfillment

Add Address

- [Click here](#) to find the required 9-digit ZIP code

- Enter the **Primary Contact For This Address**

Add Address

Primary Contact For This Address (Step 3 of 3)

You can also update and add Contacts later from the Contacts page.

Enter New Contact Not Applicable

Contact Label *

First Name *

Last Name *

Position Title

Email *

Phone *

Toll Free Phone

Fax

* Required to Complete Registration

Previous **Save Changes**

Enter a contact if it was not provided when adding an address.
Additional contacts can be added here.

Test Registration

[Change Supplier](#)

Registration In Progress for:
Harvard University

0 of 5 Steps Complete

- Welcome
- Company Overview ✓
- Addresses ✓
- Contacts** ✓
- Tax Information ✓
- Payment Information ✓
- Certify & Submit

[Registration FAQ](#) | [View History](#)

Contacts

Please enter contact information for any individuals at your organization who may provide valuable information or help to our company. This will help us ensure we are always contacting the correct individual. Contacts can be linked to one existing address. Any required contact types are listed below.

Required Information

The following contacts are required to complete registration:

- Remittance

No contacts have been entered

Add Contact ▼

Add Address

Basic Information (Step 1 of 3) ?

What would you like to label this address? *

Example: Headquarters, Houston Office

Which of the following business activities take place at this address? (select all that apply) *

- Takes Orders (fulfillment)
- Receives Payment (remittance)

* Required to Complete Registration

Next >

Hide Inactive Contacts

< Previous **Next** >

Tax Information - US Individuals and Non-Entry Visa Individuals (option 1)

You are required to provide a valid tax document. There are a **two** options on how to submit the tax document.

OPTION 1 – preferred

Use the electronic signature and pre-populated form

- Click **Add Tax Document** button
- Select correct tax document from dropdown

The screenshot shows a registration form with a sidebar on the left containing 'Tax Information', 'Payment Information', and 'Certify & Submit'. The main content area has a 'Required Information' section stating 'The following tax document are required to complete registration: - W9'. Below this, a message says 'No tax information has been entered' with a red box around the 'Add Tax Document' button. Navigation buttons for 'Previous' and 'Next' are at the bottom right.

- Complete the fields on the **Add Tax Document** pop-up box (Tax Document Name and Tax Document Year)
- Click **Sign Document**

The 'Add Tax Document' pop-up box shows 'Tax Type' as 'W-8BEN'. The 'Tax Document Name' field contains 'Self Populated' and the 'Tax Document Year' is set to '2022'. The 'Signature Status' is 'Review Attachment'. The 'Tax Documentation' section has a red box around the 'Sign Document' button. There is also a checkbox for 'Manually upload the document instead'.

- A Success message will briefly appear in green
- A new browser window with a pre-populated Adobe form will open.
 - If prompted, select Continue to acknowledge Adobe's Terms of Service.

Success
Tax Document Created

- **Select Start**, review and validate the data in form is accurate and complete

The first screenshot shows a 'W-9' form with a red box around the 'Start' button. The second screenshot shows a 'W-8BEN' form with a red box around the 'Start' button. Both forms are titled 'Request for Identification Number' and are from the Department of the Treasury.

- **Click to sign document**

The 'Sign Here' section shows a 'Next' button on the left. A text box contains the statement 'I certify that I have the capacity to sign this document on behalf of the Beneficial Owner identified on line 1 of this form.' Below this is a red box around the 'Click here to sign' button. The signature line is labeled 'Signature of beneficial owner (or individual authorized to sign for beneficial owner)' and the name line is labeled 'Print name of signer'.

- If prompted, select **Click to Sign** on Adobe notification

The notification window shows a 'Sign Here' button on the left. A text box contains the statement 'I certify that I have the capacity to sign this document on behalf of the Beneficial Owner identified on line 1 of this form.' Below this is a red box around the 'Click to Sign' button. The signature line is labeled 'Signature of beneficial owner (or individual authorized to sign for beneficial owner)' and the name line is labeled 'Print name of signer'.

- Return to Registration window and click **Save Changes** to complete the Tax section.

The 'Edit Tax Document' pop-up box shows 'Tax Type' as 'W-8BEN'. The 'Tax Document Name' field contains 'test' and the 'Tax Document Year' is set to '2022'. The 'Signature Status' is 'AdobeSigned'. The 'Tax Documentation' section has a red box around the 'Save Changes' button. There is also a checkbox for 'Manually upload the document instead'.

Tax Information - US Individuals and Non-Entry Visa Individuals

(option 2)

You are required to provide a valid tax document.

There are a **two** options on how to submit the tax document.

OPTION 2:

If you already have a signed, valid completed tax form, it can be uploaded here.

- Click **Add Tax Document**

The screenshot shows the 'Test Individual' registration page. The 'Tax Information' section is highlighted, and a red box around the 'Add Tax Document' button indicates the next step. The page also shows a 'Required Information' section with a message: 'No tax information has been entered' and a red box around the 'Add Tax Document' button.

- Complete the fields on the **Add Tax Document** pop-up box (Tax Document Name and Tax Document Year)

- **Select the box next to “Manually upload the document instead”**

The screenshot shows the 'Add Tax Document' pop-up box. The 'Tax Document Name' field is filled with 'Self Populated' and the 'Tax Document Year' is set to '2022'. The 'Manually upload the document instead' checkbox is checked. A red box highlights the 'Manually upload the document instead' checkbox.

- **Select File** and upload document

The screenshot shows the 'Add Tax Document' pop-up box. The 'Tax Type' is 'W-8BEN'. The 'Tax Document Name' field is empty. The 'Tax Document Year' is set to '2022'. The 'Signature Status' is 'Review Attachment'. The 'Tax Documentation' section has a 'Select file' button highlighted with a red box. The 'Manually upload the document instead' checkbox is checked.

- Click **Save Changes** box to complete the section

The screenshot shows the 'Edit Tax Document' pop-up box. The 'Tax Type' is 'W-8BEN'. The 'Tax Document Name' is 'test'. The 'Tax Document Year' is '2022'. The 'Signature Status' is 'AdobeSigned'. The 'Tax Documentation' section has a 'Signed Document' button. The 'Manually upload the document instead' checkbox is unchecked. The 'Save Changes' button is highlighted with a red box.

Payment Information

Select your payment method.

Testing Vendor	Payment Information
Registration In Progress for: Harvard Portal 0 of 5 Steps Complete	For Individuals: Zelle is a fast and easy way for individuals to receive money electronically. <ul style="list-style-type: none">• Provide Harvard University with the email address that is or will be associated with your Zelle account (must be a US bank ac• Harvard will use email address only when communicating payment information.• The Zelle app does not work overseas even if you do have a US phone number and US bank account.
Welcome	Register now via the following link: https://enroll.zellepay.com/
Company Overview ✓	What payment method do you prefer? ★ <input type="text" value="Zelle"/>
Addresses ✓	<input type="checkbox"/> By checking this box, the payee hereby confirms and agrees that: ★ <ol style="list-style-type: none">The e-mail address entered below is associated with a U.S. bank account of the payee into which the payee authorizes paymThe payee understands that digital disbursement is processed by Zelle utilizing network banks and is made available by Harv extent permitted by law, the payee releases and indemnifies Harvard from any liability in connection with any delayed, undeliv digital disbursement.The payee consents to the sharing of the e-mail address entered above and any other information entered onto this Supplier purpose of processing digital disbursements. The payee further consents to the disclosure of information regarding the pay federal, state or foreign authority or governmental body, to the extent required by legal disclosure obligations (including, with counter-terrorism financing laws).
Contacts ✓	Payment Distribution Email Address ★ <input type="text"/>
Tax Information ✓	
Payment Information ✓	
Certify & Submit	

★ Required to Complete Registration

[← Previous](#) [Next >](#) [Save Changes](#)

If selecting Zelle as the payment method, provide a payment distribution email address and **select** the box to attest to the statement.

Please note: the Payment Distribution Email Address needs to be the email associated with bank account.

Note: “Wire” can not be selected as a form of payment.

If a wire payment is required, select “Paper Check via Mail” and then coordinate the payment with the school/department you are doing business with.

Additional International Information

(This section is required for non-US payees)

If you don't see this tab, and you have Visa information:

Review and update your Legal Structure on the Company Overview section.

The screenshot shows a web form titled "Additional International Information" for a user registered as "Harvard University". The form is part of a 7-step registration process, with 3 steps completed. The "Additional International Information" step is currently active and marked with a green checkmark. The form contains the following fields and instructions:

- Visa type***: A dropdown menu with a red box around it.
- Country Issuing Passport**: A dropdown menu.
- Date of Birth**: A date input field with a calendar icon and the format "mm/dd/yyyy".
- Visa Sponsored By Harvard?**: A dropdown menu.
- Please enter your immigration document start date.**: A text input field.
- Visa Start Date**: A date input field with a calendar icon and the format "mm/dd/yyyy".
- Please enter your immigration document end date.**: A text input field.
- Visa End Date**: A date input field with a calendar icon and the format "mm/dd/yyyy".

At the bottom of the form, there is a "What's next?" section with the following instructions:

- On the following step, you will certify & submit this registration.
- If required, you will receive an email from our tax determination system hutax@sprintax.com to provide required U.S. tax information.
- For additional information related to tax compliance, visit: <https://nratax.oc.finance.harvard.edu/>

At the bottom of the form, there is a "Required to Complete Registration" notice and three buttons: "Previous", "Next", and "Save Changes". The "Save Changes" button is highlighted with a red box.

Required: Foreign/non-US payees need to select a Visa type.

- If your visa type is “NE| No Entry / No U.S. presence” - You are required to provide a valid tax document in the Tax Information section.
- All other visa types - After completing your B2P registration, you will receive an email from our tax determination system hutax@sprintax.com to provide required U.S. tax information.
- Be sure to click “save changes” and complete registration steps on the next page.

For additional information related to tax compliance, visit: <https://nratax.oc.finance.harvard.edu>

Certify & Submit and Next Steps

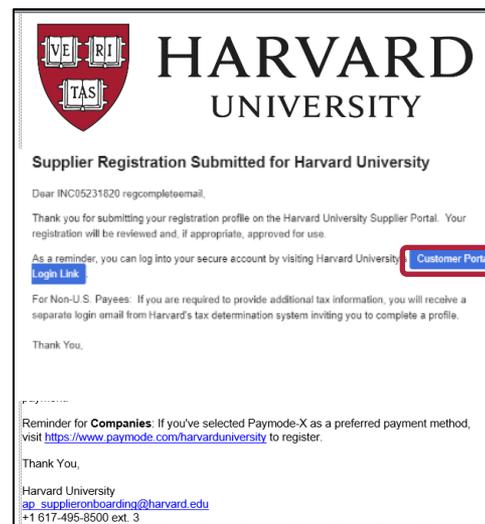
When all sections are completed (as indicated by checkmarks):

- **Select** the Certification box to certify that all information provided is true and accurate
- **Click Submit**

What's next?

Once submitted, Supplier will receive a confirming email* (as seen below).

- The registration will be reviewed by the Harvard Supplier Onboarding team.
- If required, supplier will receive an email from our tax determination system (hutax@sprintax.com) to provide required U.S. tax information.
- If additional information is required, Harvard will notify you via email.



*The email includes a link to the Customer Portal. Using this link, the supplier can continue to access and manage their supplier profile.

Supplier Onboarding Team for questions related to B2P supplier registration:

Phone: (617) 495-8500 (option 3)

Email: AP_SupplierOnboarding@harvard.edu

International Payee Tax Compliance (IPTC) team for questions related to non-US payees and tax determination system:

Phone: (617) 495-8500 (option 5)

<https://nratax.oc.finance.harvard.edu>

Jaggaer Support for Supplier assistance including adding attachments, browser errors, or technical problems:

Phone: (800) 233-1121

<https://www.jaggaer.com/supplier-support>

Save this URL to update and manage your profile going forward:

<https://solutions.scquest.com/apps/Router/SupplierLogin?CustOrg=HarvardFullSuite>