Business Entity/Independent Contractor Resource Guide

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Registration
These instructions are offered as guidance for completing your Business Entity/Independent Contractor Supplier Registration and Portal Information. Upon receipt of a Supplier/Payee registration invitation from University of Pennsylvania (support@sciquest.com), new suppliers may register in the supplier portal also known as Penn Marketplace, at which time you will receive your login credentials. Once you have been approved by Purchasing Services and your account has been created in Penn’s financial system, you can login to update your information at https://solutions.sciquest.com/apps/Router/SupplierLogin?CustOrg=UPENN.

Supplier Invitation for University of Pennsylvania
Dear NEW COMPANY,

University of Pennsylvania

Please take a moment to complete your registration. By selecting the “Register Now” button below, you will be routed to a secure website to complete the registration process. Upon successful completion of your registration, you will have access to your secure portal where you can add additional details about your organization, invite colleagues to become users in your site, and more. Any users added to your site are required to follow federal guidelines and best practices associated with securing and protecting confidential banking information and data.

Thank You,
University of Pennsylvania

If you have any technical questions, please contact Procurement Services Operations Center at SupplierSupport@upenn.edu or +1 215-898-7216 for assistance and identify yourself as registering in the University of Pennsylvania Supplier Network.

Registration Checklist
- Registration FAQ
- Registration Tutorial

Welcome to Supplier Registration
Thank you for your interest in doing business with the University of Pennsylvania. In order to become an approved supplier with the University, you must:
1. Review the University’s standard terms and conditions: PO Terms and Conditions
2. Review the University’s Supplier Code of Conduct
3. Complete the registration information in the Penn Marketplace portal, upload IRS Form W-9 (Form W-8 for foreign suppliers)

Enter your login credentials and click Login. If you have forgotten your password, click on Trouble logging in? at the bottom of the login page.
Welcome to the University of Pennsylvania Penn Marketplace Supplier Portal. Please log in with your provided login and password.

Any issues related to logging in or technical issues, including attachments, questions can be addressed by your third party software host, Jaggear (formerly SciQuest) Supplier support team at 1-800-233-1121 or via a Support form: http://go.sciquest.com/SupplierSupportRequest.html.

Welcome Company Overview
Business Details
Addresses
Contacts
Diversity
Insurance
Payment Information
Tax Information
UPenn Terms and Conditions
Certify & Submit

You will be guided through a step-by-step registration process as indicated in the left-hand navigation path (Exhibit A). The green check mark indicates your completion of that section. A greyed-out check mark indicates there is missing information and needs your attention before your registration is complete and ready for submittal to Penn.

Note: each step of the registration process is outlined below. As you move through the registration process, your information is automatically saved once you hit the “NEXT” button on the bottom on the screen.

Welcome
Here you will find information related to the registration requirements and information you will need during the registration process.
Welcome to Supplier Registration

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Required to Start Registration
- Legal Company Name

Required to Complete Registration
- Payment Information

Company Overview

Enter details about your company:

- Does your business have a DUNS (Data Universal Numbering System) number? Y/N
- Enter your DUNS number as needed
- Enter your legal structure
  - The legal structure entered will determine whether any tax documents will be required as part of the registration process
- Enter your Tax ID Number (domestic or foreign suppliers). For independent contractors, enter your SSN.
- Website (If applicable)
- If you are doing business as an Independent Contractor, upload your required W-9
- When registering as an Individual/Sole Proprietor, please answer Additional Question

- Click “Next” to continue

### Business Details

Information in this section is related to your company’s type of services/goods provided:

- **NAICS (North American Industry Classification System)**
  - Use the search feature to best determine your NAICS code by entering a keyword related to your type of business
  - Example: Search “website design”
Addresses

At least one fulfillment (order) and one remittance address is required to complete the registration. If there are multiple fulfillment (order) or remittance addresses, please indicate ONE as the primary address for both the fulfillment and remittance addresses.

- Click “Add Address”
  - In the required field “What would you like to label this address?” enter a title (label) for the address
  - Check appropriate boxes indicating which activities take place at this address. Select all that apply (Takes orders, fulfillment) or Receive Payments (remittance)
- Click Next to “Address Details”
  - From the drop-down box, select how you would like to receive Purchase Orders; Email or FAX
  - Complete the details of the address as required
- Click Next to “Primary Contact for this Address”
  - Enter a Contact or select Not Applicable
  - Additional contacts for remittance questions and sales rep should be included if applicable
• Assign the address to a location. For each unique fulfillment (order) address, you must create a unique location. You can associate the same remittance address to one or more locations
  o Use existing location, pick location from the drop-down box
  o Enter New location in the required field “What would you like to label this location”
• Click “Next” to continue
Indicate Primary Fulfillment and Remittance if you have more than one.

Contacts

Add contact information for fulfillment, PO failure, and remittance to complete your registration if it was not entered in the previous step.

- Click “Add Contact”
- Enter a title (label) for the contact and all pertinent information
- Click “Next” to continue
**Diversity**

Penn Purchasing Services is committed to providing local and diverse businesses as much opportunity to compete for business as practically possible. As such we engage extensively with internal and external partners to help advance Penn’s economic inclusion goals.

- Click “Add Diversity Classification” – Enter multiple diversity codes as applicable
  - This yellow warning symbol indicates you must specify your diversity information in the additional selections provided to complete this step.
  - Complete and upload additional information if you are a certified diverse supplier
- If you have a diversity classification that is not listed click on the box and free form your classification in the OTHER DIVERSITY box.
- Click “Next” to continue
- If Minority Business Enterprise (MBE) was selected click on MBE link and indicate Ethnicity from drop down.

- If certified by an agency, please include additional information and upload current certificate.
Insurance

Penn requires outside parties providing services to the University or using University facilities to provide evidence of insurance. With the acceptance of the University’s PO terms and conditions, and upon request, Supplier shall furnish to Buyer a current certificate of insurance for each of the policies required. Alternatively, you can upload the appropriate insurance requirements in the portal.

- Click “Add Insurance” and enter all the required information
- Repeat for additional insurance
- Click “Next” to continue

Additional Insurance Requirements

If you provide catering services to the University, you will be required to carry the following insurance coverage: General Liability, Automobile Liability, and Worker’s Compensation Insurance. Upload the ACORD Certificate of Liability Liquor Liability insurance if you will serving alcoholic beverages.

Payment Information

Please provide a single preferred method of payment associated to the remittance address.

- Payment methods include: ePayables – 10 days, ACH – 30 days, and Check – 45 days
- All individuals will remain on immediate terms; therefore, this change primarily impacts PO suppliers that are business entities
- Click “Add Payment Information” Select from drop-down box: ePayables (Virtual Payment), ACH, or Check
- Add Payment Information (ACH)
  - Create Payment Title of your ACH account
  - Enter Electronic Remittance Email for notification
  - Enter Bank Account Details
    - Enter Bank – Bank name, Account Holder’s Name, Account type, Routing Number, and full address
- Add Payment Information (ePayables)
  - Enter payment title of the ePayables account
  - Enter Electronic Remittance email address
- Add Payment Information (Check)
  - Enter Payment title
- Click ”Next” to continue
- For Direct Deposit

**Add Payment Information**

<table>
<thead>
<tr>
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<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payment Title</td>
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</tr>
<tr>
<td>Payment Type</td>
<td>Direct Deposit (ACH)</td>
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<td>Direct Deposit Format</td>
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<tr>
<td>Remittance Address</td>
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<tr>
<td>Electronic Remittance Email</td>
<td></td>
</tr>
<tr>
<td>Currency</td>
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</tr>
<tr>
<td>Active</td>
<td>Yes</td>
</tr>
</tbody>
</table>

**Bank Account**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Country</td>
<td></td>
</tr>
<tr>
<td>Bank Name</td>
<td></td>
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<tr>
<td>Account Holder's Name</td>
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</tr>
<tr>
<td>Account Type</td>
<td></td>
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<td>Address Line 2</td>
<td></td>
</tr>
<tr>
<td>Address Line 3</td>
<td></td>
</tr>
</tbody>
</table>

- For Check

**Add Payment Information**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payment Title</td>
<td></td>
</tr>
<tr>
<td>Payment Type</td>
<td>Check (Check)</td>
</tr>
<tr>
<td>Remittance Address</td>
<td></td>
</tr>
<tr>
<td>Electronic Remittance Email</td>
<td></td>
</tr>
<tr>
<td>Currency</td>
<td></td>
</tr>
<tr>
<td>Active</td>
<td>Yes</td>
</tr>
</tbody>
</table>

* Required to Complete Registration

Save Changes Close
• For Wire Transfer – International Suppliers/Payees

Tax Information
Please complete appropriate tax forms as governed by the IRS. For more information as to how to complete a W-9 or W-8 form, please visit [www.irs.gov](http://www.irs.gov).
Domestic and Foreign Suppliers, and Independent Contractors must provide a current tax document.

You can upload a complete and signed tax document by clicking “Upload” or you can e-Certify using your supplier portal password in lieu of posting a signed document.

By using the system-generated tax document, your previously entered registration information will prepopulate into the appropriate areas of the tax document.

- Click “Add Tax Document”
  - Select your document type from the drop-down list
- Click “Download Pre-Populated Tax Document”
  - Save the completed file on your computer (Note: do not insert signature – follow the remaining instructions for your signature)
- Enter Tax Document Name – Ex. W-9-2018
- Enter Tax Document Year from dropdown list
- Click “Upload” to upload your Tax Documentation
  - Enter title
  - Click “Browse” to locate the file on your computer to include
  - Click “Add”
- Click “Save Changes,” then “Next” to continue
Add Tax Document

- **Tax Type**: W-9
- **Tax Document Name**: W-9
- **Tax Document Year**: 2018
- **Tax Documentation**:
  - Select file
  - Done
  - *W-9 2018.docx* (100%)

Download Pre-populated Tax Document

* Required to Complete Registration

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Accept University of Pennsylvania’s Purchase Order Terms and Conditions

<table>
<thead>
<tr>
<th>NEW COMPANY</th>
<th>UPenn Terms and Conditions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Registration In Progress for University of Pennsylvania</td>
<td>I, the undersigned as an authorized representative of the company listed above, agree to the University of Pennsylvania Purchase order Terms and Conditions, unless a contract stating complete alternate terms of agreement has been executed by authorized representatives of the parties, reference herein and certify that the information provided to the University of Pennsylvania is current and accurate. I agree to allow the University of Pennsylvania to access my company’s tax compliance status with the City of Philadelphia using the city’s Tax Clearance System.</td>
</tr>
<tr>
<td>7 of 9 Steps Complete</td>
<td>Do you agree with the University of Pennsylvania's Terms and Conditions listed above? *</td>
</tr>
<tr>
<td>Company Overview</td>
<td>✔</td>
</tr>
<tr>
<td>Business Details</td>
<td>✔</td>
</tr>
<tr>
<td>Addresses</td>
<td>✔</td>
</tr>
<tr>
<td>Contacts</td>
<td>✔</td>
</tr>
<tr>
<td>Diversity</td>
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<td>Insurance</td>
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<tr>
<td>Payment Information</td>
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</tr>
<tr>
<td>Tax Information</td>
<td>✔</td>
</tr>
<tr>
<td>UPenn Terms and Conditions</td>
<td>✔</td>
</tr>
</tbody>
</table>

Certify & Submit

Registration History

* Required to Complete Registration

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Accept University of Pennsylvania’s Purchase Order Terms and Conditions
If you are proposing alternate terms, select your file and upload for review by Purchasing Services.

Certify & Submit

Once all required fields have been successfully completed and you have agreed to the certification statement, you will be prompted to enter the Preparer’s Name, Title and Email address for validation and

- Click the box for “I certify that all information is true and accurate”
- Click “Submit”

You will receive an email from Penn when you have successfully completed all the registration information. Your registration information will be reviewed by the supplier support team for approval into the University’s supplier database. If additional information is needed, you will be contacted by the Supplier Support team. Penn’s approval of your registration should be completed within two business days. Once you have been approved, you will see the supplier number in your profile page on the portal under your company name.
Thank You for Registering

Registration Complete for NEW COMPANY!

Next Steps

- You will receive a confirmation email with information on what to expect next.
- Bookmark this site in your browser so you can easily make updates to your business profile.
- Send new user request to an additional portal user.
- Return to the homepage and check for any other outstanding tasks.
- Return to Registration Profile
When you have been approved, you will see the BEN supplier number indicating you are an approved supplier at Penn.
Reviewing Profile Information in Penn’s Supplier Portal

Supplier PO-Flip functionality

- Creating a PO Invoice from the Supplier Homepage (Option 1)
  - Suppliers can create an invoice from the supplier portal homepage by using the Create Invoice/Create Credit Memo widget in the center of the homepage.
  - To create the invoice, the supplier must enter an Invoice Number of their choosing and enter the PO Number and then click “Create.”
  - Suppliers should note that although the PO number is labeled “optional,” Penn requires that this field be filled in accurately to create a PO Invoice. **Non-PO Invoices cannot be submitted to Penn through the supplier portal.**
• PO-Flip functionality – from Sales Order History tab (Option 2)
  o Select “Document” > “Sales Order and Shipments” > “Sales Order History” and search by the different criteria available

• The Sales Order History displays the list of Sales Orders including details such as “Status,” “Invoice/Credit Memo No,” and “Order Total.”
- If there are invoices that have been submitted against a specific sales order, they will appear in the “Invoice/Credit Memo No” column, click on the hyperlink to see further details, including invoiced amount against this particular Sales Order on this specific invoice.
- Use the search/filter options on the left-hand navigation to further refine the search results.

- To create a PO Invoice from the Sales Order History screen, check the box next to the specific Sales Order to create an invoice. Once checked, click on the drop-down menu and select “Create Invoice” and “Go.”
- Supplier can only create one PO Invoice at a time. Multiple Sales Orders (also known as purchase orders) cannot be selected.
• Creating a PO invoice from Sales Invoice Document Search (Option 3)
  o The supplier should go to left-hand navigation and select “Documents,” and then select “Sales Invoices,” and finally “Create Sales Invoice.”

  ![Creating PO Invoice from Sales Invoice Document Search](image)

  - Enter an invoice number and the PO number and click “Create” to create the invoice.

• Submitting the PO Invoice to Penn
  • Add invoice number, select an option in the Remit-to Address Drop Down if it appears, and adjust the quantity or price, if necessary, at the bottom of the page.
  • Optional fields such as uploading Supplier Attachments, inputting a Supplier Account Number, or adding Tax, Shipping, and Handling can be completed by the supplier if needed.
  • Once the information on the invoice has been completed, select “Send to Customer” in the upper right-hand corner to submit the invoice to Penn for approval and payment.
  • After invoice is submitted, confirmation of the details will appear.
Submitting Invoices via CSV Upload

- There is an option to submit a CSV-file upload with multiple invoices through the Jaggaer supplier network page screen.
- Once the supplier has been set up for this submission type to do CSV uploads, you can enter the Jaggaer Supplier Portal by selecting the user’s name in the upper right-hand corner and clicking on “Return to Jaggaer Supplier Network” option.
- From the Jaggaer Supplier Network homepage, locate the “Create Invoice” widget and select the customer to “University of Pennsylvania” and click on “Import Invoice.”
- Additional training materials or help resources, can be found in Jaggaer’s Training & Support library by clicking on the link in the lower right-hand corner.

- Once “Import Invoice” is selected, select “Import” from the drop-down menu on the Request>Action box, add a description, and then upload the CSV file. The supplier also has the option to download the CSV Template and look at the Sales Invoice Sample Import File for guidance.
- Once uploaded, the supplier can click “Submit” to submit the file to Penn.
Searching Sales Invoices and Payment Statuses

- Select “Documents” > “Sales Invoices” > “Search for Sales Invoices” on left-hand navigation path
- Invoice status definition is listed on the homepage.

- Select search criteria for sales invoices.
Other Training Resources

To access additional tutorials and training, click on “Supplier Name,” then click on “Return to Jaggaer Supplier Network” to gain access to video training material covering many supplier-related activities including Supplier Registration and Creation of an Invoice from a Sales Order (PO-Flip process).