

## Supplier/Payee Portal - Individual Registration Guide

Thank you for your interest in becoming part of the Princeton University Community.

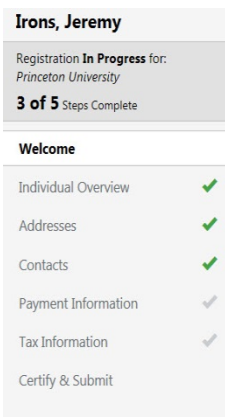
Below are instructions on completing your individual registration with Princeton University's Supplier/Payee Portal.

To access your custom profile, click on the "Register Now" link from your invitation email. The [Register Now](#) link will take you directly to a profile that has already been created for you. Please do not try to enter the portal another way, as you will not be able to access your custom profile.

New registrants will be asked to establish an account. This is a simple process where you will choose your password and security question for your account. Make sure you remember your password, as you will need the password again to complete the registration.

Once you have created an account, you can then log back in at any time to update information, through [Princeton University Supplier/Payee Portal](#). You may log in to update your contract information, your address, or your payment information. Remember: you should only use the above, direct link to the portal after you have created your password and security question.

When you enter the Princeton University Supplier/Payee Portal, you will be prompted to enter your email and password and click [Login](#). If you do not remember your password select the [Trouble logging in?](#) link.



**Irons, Jeremy**

Registration **In Progress** for:  
Princeton University

**3 of 5** Steps Complete

**Welcome**

- Individual Overview
- Addresses
- Contacts
- Payment Information
- Tax Information
- Certify & Submit

There are 6 sections of the registration process. Each section will be indicated on the left panel of the registration screen (areas with a green check are complete). If an area is missing required information the check mark will be greyed out. These areas will need attention before your registration can be submitted.

Below is additional information about each step in the registration process. As you go through the registration, information will be automatically saved every time you go to a new section. If you need to leave your registration at any time, you may use the [Princeton University Supplier/Payee Portal](#) to return and complete the registration.

As you navigate through the registration, you can use the [Next >](#) button at the bottom of the screen to move from one section to the next.

### Welcome

This step provides information related to registration requirements and information you will need during the registration process.

Your name should be pre-populated, but please check that the spelling is correct and that your full legal name is represented. If you need to make any corrections to your name, you may do that here.

## Individual Overview

Enter individual details.

- Enter your **Country of Origin**
  - o Please note: This should be your country for **tax purposes**.
  - o If you are a US citizen or US Permanent Resident (Green Card holder), please select “United States” from the drop down box
  - o If you are unsure of how to answer this question, please consult with your tax preparer.
- Enter your **Legal Structure (Individual/Sole Proprietor or Foreign Individual)**
  - o The selection entered in the Legal Structure field will determine which (if any) tax documents will be available during the registration process.
  - o If you have selected “United States” under “Country of Origin”, you should also select “Individual/Sole Proprietor” here.
- Enter your **Tax ID Type (Individual/Sole Proprietor only)**
  - o As you are an individual, please select “Social Security Number” from the drop down
  - o If you wish to provide Princeton with an Employer Identification Number, please contact us at (609) 258-3080.
  - o Individual registrations with “Employer Identification Number” selected cannot be accepted.
- Enter your **Tax ID Number**
  - o Enter your Social Security Number in this space
  - o Enter the number without dashes, spaces, or any other special characters
- **Additional Questions**
  - o Select the check box to confirm that you are doing business with Princeton University as an individual who should receive payment from the University.
  - o If this is not the case, please contact us at (609) 258-3080
- You have now completed all steps on the Individual Overview page.
- Click [Next >](#)

## Addresses

At least one address is required in order to complete registration.

- Click [Add Address](#) to open and add an address with the Address Wizard
- Add Address – **Address Details (Step 1 of 2)**
  - a. In the required field “What would you like to label this address?” Enter a title (label) for the address; this label can be however you would like to refer to this address, e.g. “Home” or “Office”
  - b. Enter the remaining information - Country, Address Line 1 (Address Lines 2 and 3 are optional) , City/Town, State/Province, Postal Code
  - c. Phone, Toll Free Phone and Fax are optional.
- Click [Next >](#) - to enter the **Primary Contact for this Address (Step 2 of 2)**
- **Enter a Contact** or select **Not Applicable (this section is optional)**
  - a. It is not required to add a contact if you are the main point of contact for all future inquires
  - b. If you would like to enter a contact, first enter a title (label) for the Contact; this label can be however you would like to refer to this contact, e.g. “Assistant” or “Self”
  - c. Enter the remaining contact information (First Name, Last Name, Email and Phone)
  - d. Position Title, Phone and Fax are optional
- Click [Save Changes](#)
- Click [Next >](#)

## Contacts

Adding a contact is not required as part of your registration. You may have already added a contact through the Address Wizard. If you do not wish to add a contact, you may skip this section.

If you would like to add an additional contact, other than yourself, as a contact for questions regarding your profile, you may add them in this area. Please label the contact with the appropriate label, such as “Assistant”, “Alternate”, etc.

- Click
- Enter a title (label) for the Contact; this label can be however you would like to refer to this contact, e.g. “Assistant” or “Alternate”
- Enter First Name, Last Name, Email and Phone for the contact
- Position, Title and Fax are optional
- Click
- Click

## Payment Information

Please provide a single preferred method of payment. We do not offer multiple payment methods. More information on the University’s payment terms can be found [here](#).


- Please provide a **single** preferred payment method. We do not offer multiple payment methods.
- For individuals, payment terms are immediate.
- Princeton does not offer domestic wire transfers.
- 
- Click  ; the choices are Direct Deposit (ACH) or Check
- If you would like to be paid by direct deposit, you will need to set up your bank account
  - a. Select **Direct Deposit (ACH)**
  - b. Enter **Payment Title**; this title can be however you would like to refer to this payment, e.g. ‘Bank of America checking account’ or ‘Joe’s checking’
  - c. Enter **Electronic Remittance Email** and **Currency**
  - d. Enter Bank Account Details:
    - i. You will need to provide the bank - **Country, Bank Name, Account Holder’s Name, Account Type, Routing Number, Account Number, Bank - Address Line 1, Bank - City/Town, Bank - State/Province, Bank - Postal Code**
  - e. Additional Questions – **Specify Payment Terms** – you do not need to specify payment terms, as all individuals are paid on immediate terms, according to Princeton policy
- If you would like to be paid by check
  - a. Select **“Check”**
  - b. Enter **Currency - USD**
- Click
- Click

## Tax Information

Here you will be required to upload your tax document (W-9 or W-8). Princeton University is unable to provide advice on completing tax forms as these forms are governed by the IRS. If you have questions about how to complete a W-9 or W-8 form, please visit [www.irs.gov](http://www.irs.gov).


- Individuals will need to provide a current tax document.
- If you have already completed and signed your tax document click upload.
- If you choose to download the pre-populated document tax document, please save the completed file to your computer.
- You can e-Certify this pre-populated tax document using your portal password in lieu of a physical signature.

Princeton University recommends that you use the system generated tax document, which will pre-populate the information you previously provided in your registration into the appropriate area of the tax document. Below are instructions for using the pre-populated document and electronic signature:

- Click
- a. Select your document type from the drop down list – (W-9, W-8BEN, W-8BEN-E)
- Click  [Download Pre-populated Tax Document](#)
- Save the completed file on your computer; make sure the file is somewhere easy to access, like your desktop (do not insert anything in the signature line or date line – the following steps will walk you through electronic signature options below)
- Enter **Tax Document Name**
  - a. Example: W-9 2017
- Enter **Tax Document Year**
- Tax Documentation
  - a. Upload the tax document
  - b. Click
  - c. Enter **Title** (Example: “W-9” or “W-8”)
  - d. Click  to locate the file on your computer to be included as your tax document, follow your prompts to select and include the file you saved in step above
  - e. Click
- To e-Certify, check **I certify this tax document** box
  - a. A new window will open
  - b. Once you have read the information, scroll to the bottom to enter your Supplier/Payee portal password (this is the password you used to log onto the Supplier Portal)
- Click
- Click

## Certify & Submit

If any required fields have not been completed during the registration process you will be prompted to complete them. The below is an example of the type of message that will appear for any required fields missing. You can click on the hyperlinks which will take you directly to the section and field missing information.

 **The list below needs to be addressed before your registration can be submitted.**


Accounts Payable

- [Click here to identify missing required items](#)

Tax Information

- [Click here to identify missing required items](#)

Once all required fields have been completed and you have read the statement.

- Enter the **Preparer's Name, Preparer's Title and Preparer's Email Address**
- Click the box **I certify that all information provided is true and accurate.**
- Click 

**You will receive an email when you have submitted a completed registration profile. Your registration will be reviewed by Procurement Services. If any additional information is needed, you will be contacted.**

Still have questions? Please contact Princeton University (Financial Service Center) at [finance@princeton.edu](mailto:finance@princeton.edu) or +1 (609) 258-3080 for assistance.