

# the general ledger

News from the Princeton University Office of Finance & Treasury



## OPT-IN TO RECEIVE YOUR W-2 AND/OR 1042S FORMS ELECTRONICALLY

The University provides employees with their W-2 and/or 1042s forms each year by January 31 and March 31, respectively. The IRS permits employers to issue electronic W-2 and 1042s forms only to employees who give their consent to receive these documents electronically, otherwise they must be printed and mailed. The benefits of receiving an electronic W-2 and/or 1042s form include:

- Earlier access to view and print your forms
- Reduced worries about mail delivery and delays
- Information that may be downloaded into many tax preparation software programs

Please note that no action is required for those who have previously consented for electronic receipt. Employees also have the option to withdraw their consent.

To take advantage of these benefits, and receive your W-2 and/or 1042s forms electronically, visit [HR Self-Service](#) or [Tiger Hub](#), select the Payroll tile and choose the W-2/W-2c/1042s consent link.

For more information or assistance, please contact our Payroll Services team at [payroll@princeton.edu](mailto:payroll@princeton.edu) or (609) 258-3082.

## Embark on Travel Training!

The Princeton University Travel Program offers a robust schedule of [instructor-led training programs](#) including:

- Navigating Group Travel
- Understanding the Travel Booking Process in Concur
- Managing Travel for Others - Concur for Travel Arrangers
- Concur Tips & Tricks

We also offer [travel training modules](#) to view at your convenience. The [Concur Travel Overview](#) is a 15-minute video that is recommended for all new users of Concur Travel. There are other brief, topic-specific modules. Most are under five minutes and provide a more comprehensive look into individual Concur features.



# Understanding the Supplier/Payee Onboarding Process

From welcoming University guests to hosting conferences and events, it has been exciting to see Princeton's activities return to full swing this semester. Some of you may be onboarding suppliers and/or payees for the first time in a while and if so, we encourage you to use the tools and resources available to assist with these processes.

Below are four helpful suggestions:

## 1 PLANNING AHEAD

As you look toward your activities and events for the spring semester, take time now to collect the supplier/payee information to ensure that the supplier/payee can be paid and provided timely payment. Keep in mind that all payees must be screened to ensure compliance and may require the University to collect tax information from the payee, so providing ample lead time is always recommended. Some helpful supplier onboarding tools include a knowledge article on [Requesting and Updating Suppliers](#) and a decision document on [Paying Foreign Guests and Speakers](#).

## 2 SEARCHING FOR ACTIVE SUPPLIERS/PAYEES

The reason for a returned supplier onboarding request is often that the supplier/payee already exists in our system. To avoid unnecessary steps in your process, check the [Marketplace](#) to [see if a supplier exists](#) before completing the necessary documentation. If the supplier/payee exists but is not Active, submit a Supplier Request in the Prime Marketplace to Reactivate the supplier, noting in the [Comments Box](#) the nature of the payment to be made.

## 3 UNDERSTANDING RETURNED ONBOARDING REQUESTS

Whether it is because we need more information, a supplier/payee is already active, or a supplier/payee cannot be paid, there are circumstances when an onboarding request is marked **Returned**. In all cases, a note explaining why the request was returned can be found in italics in the email notification and by going to the [Marketplace](#) and clicking on the [Suppliers icon, Requests](#), followed by [My Supplier Requests](#). Then, select the supplier you wish to view and click [History](#) in the top right corner. A pop-up screen will appear that will show the steps that have been completed, as well as any pending steps. Here the individual who submitted the request will see the full history of the supplier/payee request details.

## 4 DETERMINING THE STATUS OF THE SUPPLIER ONBOARDING PROCESS

If it has been a couple of days since you submitted the onboarding request and you need to determine the status of the supplier/payee you are onboarding, the fastest way is to search for the supplier via the [Supplier Search Bar](#) in the [Marketplace](#) and then click [View History](#) in the bottom left of the supplier's Marketplace profile. This will provide insight on whether the onboarding is still with the supplier to register and provide the required information, or if it is pending approval. Please try to avoid submitting multiple inquiries as this may further delay the process.

For assistance onboarding suppliers or with any other finance-related questions, please contact the Financial Service Center via the [Finance Inquiry Form](#), [finance@princeton.edu](mailto:finance@princeton.edu), or 609-258-3080.



## COMING IN FEBRUARY: FINANCE FRIDAY FORUMS

Building off of the success of the Finance Refresher training series offered at the beginning of each academic year, and to provide more opportunities for troubleshooting support and customer service to our campus partners, we are pleased to announce new Finance Friday Forums that will start in February.

These buying and paying sessions have been created to provide a brief overview of a specific topic and to offer one-on-one or group guidance to our campus customers on how to perform various financial transactions. Whether you need help onboarding a supplier or payee, creating a requisition, or resolving a complex match exception we hope these forums will offer timely assistance for inquiries that may take a little longer to resolve than an email or phone call to the Financial Service Center.

The Finance Friday Forums will start on Friday, February 3 and will be held on the first and third Friday of each month. More information will be sent soon and registration will be made available in the Employee Learning Center. In the meantime, if you have any questions please contact [Allison Petito](#).

## TRAVEL SHOWCASE Educational Sessions

Procurement Services and the Princeton University Travel Program hosted a travel showcase on October 17. Thank you to all who took advantage of this opportunity to connect directly with travel providers. The University's preferred airlines, hotels, car rental companies, and transportation providers were in attendance along with University partners that support the travel program. Educational sessions were offered throughout the day on many travel-related topics. For those who were unable to attend the sessions in person, [presentations from all Educational Sessions](#) are now available on the Travel & Expense website.

## Holiday Gift Policy Reminder

With the holiday season upon us, please be sure to review the University Gift policy in the Business Expense Policy.

As a reminder, holiday gifts are not an allowable expense. Gifts to employees and non-employees of a modest value are allowable in certain limited circumstances such as in recognition of certain personal and professional events. Additional information can be found in the [business expense policy](#).



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