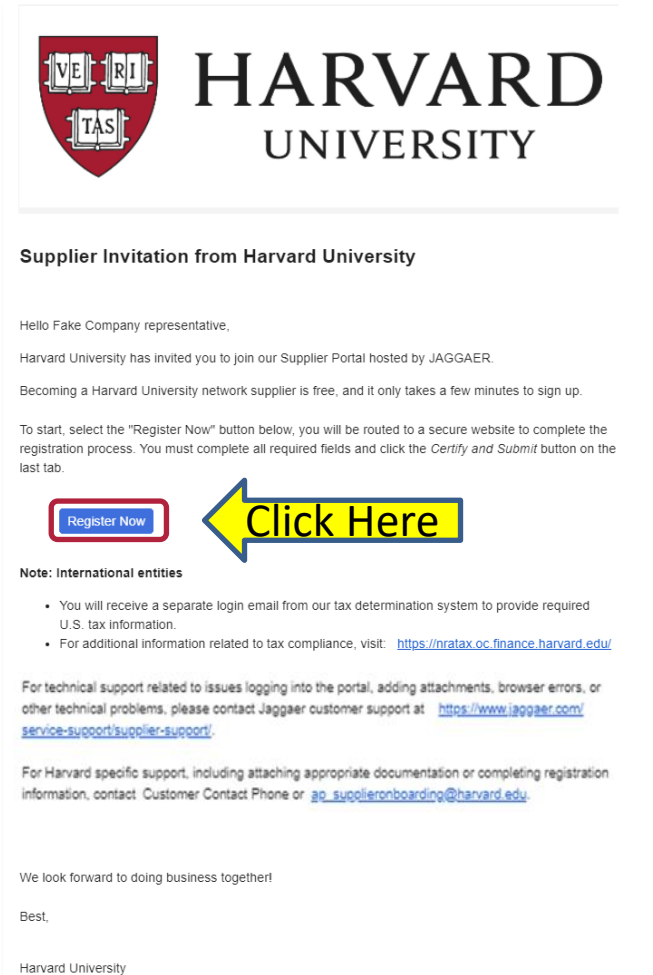


Supplier Experience – Company/Entity

This guide outlines the registration process for Companies to register as a supplier.



Overview:

- Suppliers are invited by Harvard University using the 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 see the email –please check your spam folder.
- The email invitation contains a *unique* link allowing you to begin registration.
- Recommended Browsers are Chrome or Firefox

Note for International entities:

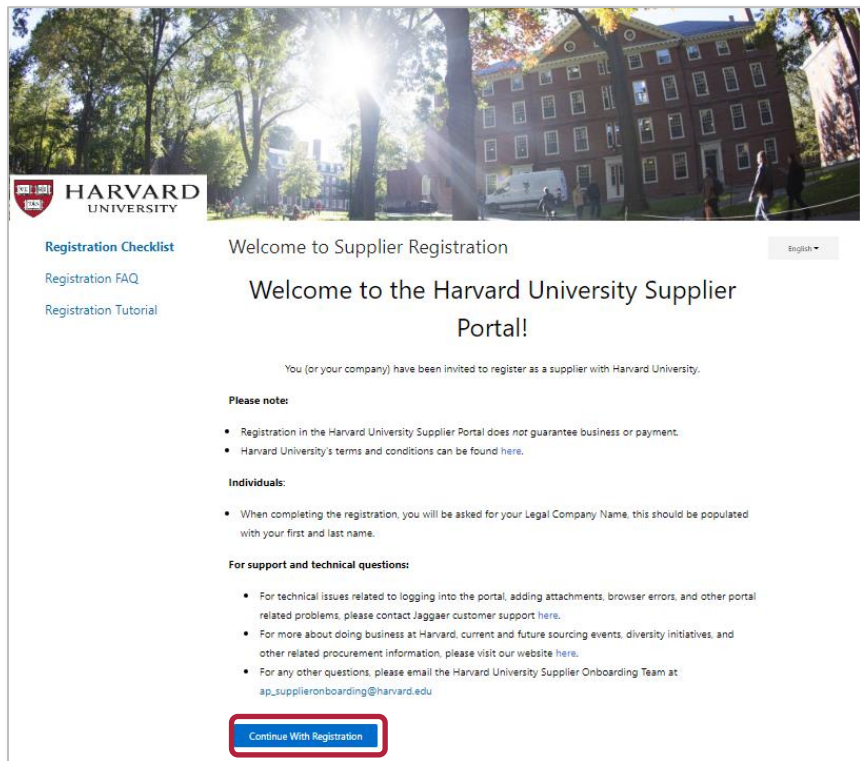
- You will receive a separate login email from Harvard's tax determination system inviting you to complete a profile. This email will be sent after you have completed the B2P registration process.
- For additional information related to tax compliance, visit: <https://nratax.oc.finance.harvard.edu>

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

Starting the Registration process

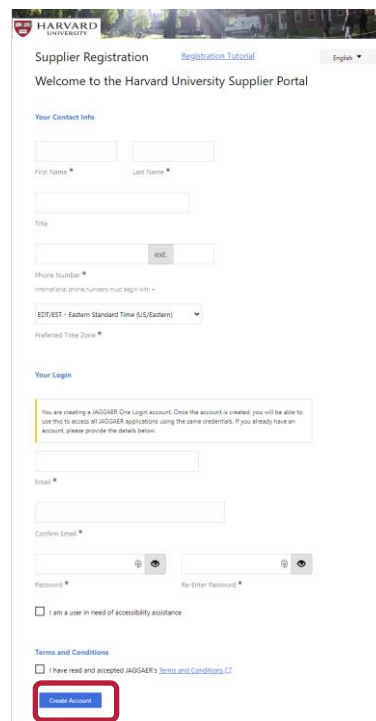
The **Supplier Registration page** is where you create a new user account.

Select **Continue with Registration**.



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)



Company Overview

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
2 of 7 Steps Complete

Welcome

Company Overview ✓

Business Details ✓

Addresses ✓

Contacts ✓

Diversity ✓

Tax Information ✓

Payment Information ✓

Certify & Submit

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

Company Overview

The material collected on this page allows Harvard University to retain general information about your company ensuring the most up-to-date information is provided to Harvard's purchasing community.

For individuals, the legal company name will be your full name.

Doing Business As (DBA)

Does your business have a DUNS number? ☐ Yes ☐ No

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.

Legal Structure ★

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.

US Tax ID Number (SSN/TIN)

Website

★ Required to Complete Registration

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

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

You will be guided through a series of pages with questions relevant to Legal Structure.

Please be sure to provide the appropriate Legal Structure information as it is stated on the IRS tax document.

Foreign Entities select "Non-US Based Entity"

Business Details

(optional)

Optional – Enter business details and product & service information.

Test Registration

[Change Supplier](#)

Registration In Progress for:

Harvard University

2 of 7

Steps Complete

Welcome

Company Overview

Business Details

Addresses

Contacts

Diversity

Tax Information

Payment Information

Certify & Submit

[Registration FAQ](#)

[View History](#)

Business Details

Number of Employees

Products and Services

NAICS Codes

No Primary NAICS Code Selected

Edit

★ Required to Complete Registration

< Previous

Next >

Save Changes

Address

Provide **two** addresses:

- **Fulfillment** (the tax reporting address & address for POs)
- **Remittance** (address where a payment is sent)
- Click **Add Address**

The screenshot shows the 'Test Registration' page. On the left is a sidebar with navigation links: 'Registration In Progress for: Harvard University', '2 of 6 Steps Complete', 'Welcome', 'Company Overview' (with a green checkmark), 'Addresses' (highlighted with a triangle), 'Contacts', 'Tax Information' (with a green checkmark), 'Payment Information', 'Additional International In...', and 'Certify & Submit'. The main content area is titled 'Addresses'. It contains a list of instructions: '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', and 'Click here to find the 9-digit ZIP code for a US address'. Below this is a blue box titled 'Required Information' stating 'The following address types are required to complete registration:' with a list: '- Fulfillment' and '- Remittance'. At the bottom, it says 'No addresses have been entered' and features a red-bordered 'Add Address' button.

- Enter **label** for address (such as “home”, “office”)

The screenshot shows the 'Add Address' modal window, 'Basic Information' step (Step 1 of 3). It has a question 'What would you like to label this address? *' with a text input field and an example 'Example: Headquarters, Houston Office'. Below is a question 'Which of the following business activities take place at this address? (select all that apply) *' with two checkboxes: 'Takes Orders (fulfillment)' and 'Receives Payment (remittance)'. At the bottom, it says '* Required to Complete Registration' and has a 'Next >' button.

• Enter Address Details

- **Select** 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 *)

The screenshot shows the 'Add Address' modal window, 'Address Details' step (Step 2 of 3). It has a dropdown menu for 'How would you like to receive purchase orders for this fulfillment address?' with options 'Email', 'Fax', and 'Mail' (selected). Below are fields for 'Country *', 'Address Line 1 *', and 'Address Line 2'. To the right, there are sections for 'Address Label' (with a warning icon and 'legal address') and 'Address Types' (with 'Remittance' and 'Fulfillment' options). At the bottom right is a red-bordered 'Add Address' button.

- If providing a PO BOX, use **Add Address** to also include your legal address as a separate address
- [Click here](#) to find the required 9-digit ZIP code

- Enter **the Primary Contact For This Address** and click **Save Changes**

The screenshot shows the 'Add Address' modal window, 'Primary Contact For This Address' step (Step 3 of 3). It has a note 'You can also update and add Contacts later from the Contacts page.' and two radio buttons: 'Enter New Contact' (selected) and 'Not Applicable'. Below are fields for 'Contact Label *', 'First Name *', 'Last Name *', 'Position Title', 'Email *', 'Phone *' (with an 'ext.' dropdown), 'Toll Free Phone' (with an 'ext.' dropdown), and 'Fax'. Each phone field has a note 'International phone numbers must begin with +'. At the bottom, it says '* Required to Complete Registration' and has 'Previous' and 'Save Changes' buttons.

Contacts

(required)

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

0

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 >

buy2pay

Optional – Companies are encouraged to provide diversity certifications, if applicable.

Test Registration

Change Supplier

Registration In Progress for: Harvard University

2 of 7 Steps Complete

Welcome

Company Overview

Business Details

Addresses

Contacts

Diversity

Tax Information

Payment Information

Certify & Submit

Registration FAQ | View History

Diversity

We strive to do business with diverse companies. By entering applicable diversity classifications, you will help us meet certain spending goals for our organization.

For each Diversity Classification, select "edit" in the dropdown to finish entering your supplier diversity information.

Click the button below to choose the diversity classifications that apply to your business.

Add Diversity Classifications

Small Business Status and Diversity Classifications

No Classification

Does Not Qualify as a Small Business or Diverse Supplier (DoesNotQualify)

Decline to Answer (DeclineAnswer)

Federal Diversity Classifications

☐ Small Business

☐ HUBZone Small Business (HUBZ)

☐ Service-Disabled Veteran-Owned Small Business (SDVOSB)

☐ Veteran-Owned Small Business (VOSB)

☐ AbilityOne (JWOD)

☐ Alaskan Native Corporations (ANC)

☐ Disabled Veteran Owned Business (DVBE)

☐ Federal Foreign (FR)

☐ Foreign Vendor (FV)

☐ Historically Underutilized Business (HUB)

☐ Hudson Initiative - Small Entrepreneurship Program (HISEP)

☐ Large Business Enterprise (LBE)

☐ Minority Business Enterprise (MBE)

☐ 8(a) Business Development Program (8a)

☐ Minority Owned Small Business (MOSB)

☐ Small Disadvantaged Business (SDB)

☐ Woman-Owned Small Business (WOSB)

☐ Airport Concessions Disadvantaged Business Enterprise (ACDBE)

☐ Disabled Person-Owned Business (DOBE)

☐ Disadvantaged Business Enterprise (DBE)

☐ Federal Nonprofit (NP)

☐ Historically Black College/University or Minority Institution

☐ HUBZone Enterprise (HUBZE)

☐ Indian Tribes

☐ Lesbian/Gay/Bisexual/Transgender Owned Business (LGBTB)

☐ Minority Institution (MI)

Previous

Next

Done

Close

Diversity Classification

Small Business

Add Diversity Classifications

Additional Information

What is your CAGE code?: 123

Edit

Edit

Delete

Select Add Diversity Classifications

Check the applicable classifications and then select Done

For each Diversity Classification select Edit in the dropdown to finish entering your supplier diversity information.

Contact the Office for Economic Inclusion & Diversity for additional information supplierdiversity@harvard.edu

buy2pay

Tax Information Section - US Entities

(option 1)

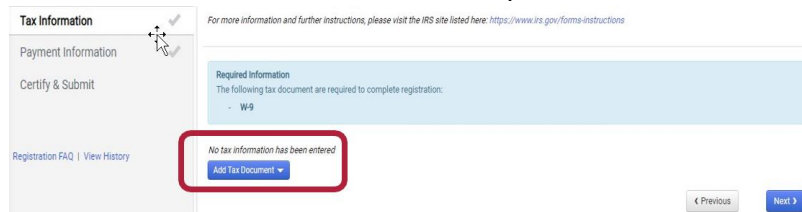
Complete the Tax Information section

Suppliers are required to provide a valid tax document. There are two options on how to submit the tax document as a US Entity

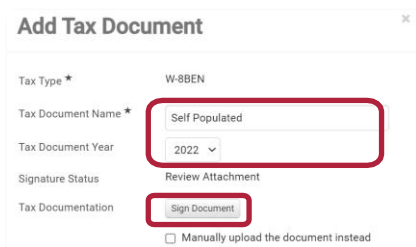
OPTION 1 – preferred

Use the electronic signature and pre-populated form

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



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



- A Success message will briefly appear in green

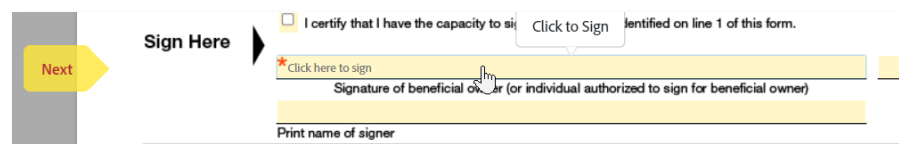
Success
Tax Document Created

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

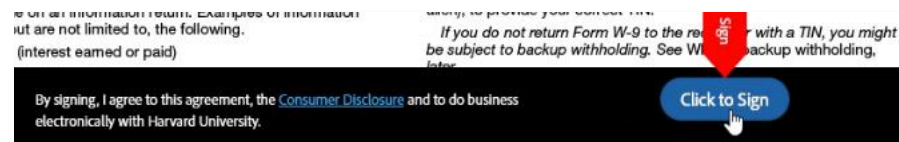
- Select **Start**, review, validate, then **sign** the document to attest that it is correct



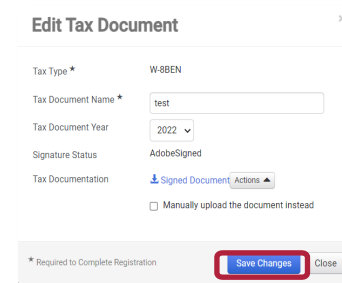
- Click to sign document



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



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



Tax Information Section - US Entities

(option 2)

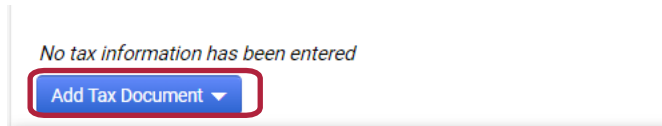
Complete the Tax Information section

Suppliers are required to provide a valid tax document. There are two options on how to submit the tax document as a US Entity

OPTION 2:

If you already have a signed valid completed tax form

- Click **Add Tax Document**



- Complete the fields on the **Add Tax Document** pop-up box (Tax Document Name and Tax Document Year)
- Tick the box next to "Manually upload the document instead"

A screenshot of the "Add Tax Document" pop-up box. It contains the following fields: "Tax Type" (W-8BEN), "Tax Document Name" (Self Populated), "Tax Document Year" (2022), "Signature Status" (Review Attachment), and "Tax Documentation" (Sign Document). The "Manually upload the document instead" checkbox is checked. The "Save Changes" button is highlighted with a red rectangle.

- Select File and upload document

A screenshot of the "Add Tax Document" pop-up box. It contains the following fields: "Tax Type" (W-8BEN), "Tax Document Name" (empty), "Tax Document Year" (dropdown), "Signature Status" (Review Attachment), and "Tax Documentation" (Select file). The "Select file" button is highlighted with a red rectangle. Below the button is a link "Download Pre-populated Tax Document" and a checked checkbox "Manually upload the document instead". The "Save Changes" button is highlighted with a red rectangle.

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

A screenshot of the "Edit Tax Document" pop-up box. It contains the following fields: "Tax Type" (W-8BEN), "Tax Document Name" (test), "Tax Document Year" (2022), "Signature Status" (AdobeSigned), and "Tax Documentation" (Signed Document). The "Manually upload the document instead" checkbox is unchecked. The "Save Changes" button is highlighted with a red rectangle.

Tax Information Section – Non-US based Entity

Click Next

Note: After completing this B2P registration process, all Non-US based entities will receive an email from our tax determination system to provide required U.S. tax information.

contract store

Registration In Progress for:
Harvard University

3 of 8 Steps Complete

Welcome

Company Overview ▲

Business Details ✓

Addresses ▲

Contacts ▲

Diversity ✓

Tax Information ✓

Payment Information (No... ▲

Payment Distribution Ema... ▲

Certify & Submit

Tax Information ?

US Individuals and Entities

- To ensure compliance with US regulations, US Citizens, legal permanent residents, and US entities are required to provide a completed & signed W-9.
- Please attach W-9 form below.
- Guidance to complete W-9: <https://www.irsvideos.gov/Individual/Resources/HowToCompleteFormW-9>

International payees (Individuals & Entities)

- If required, you will receive an email from our tax determination system hutax@sprintax.com to provide required U.S. tax information.
- Individuals with no US presence must complete and upload a W-8BEN below.
- For additional information related to tax compliance, visit: <https://nratax.oc.finance.harvard.edu/>

No tax information has been entered

Additional Questions

Foreign Tax Identification Number

◀ Previous

Next >

Save Changes

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

Payment Information

Select payment method.

Test Registration Change Supplier	Payment Information
Registration In Progress for: <i>Harvard University</i> 2 of 7 Steps Complete	PAYMENT OPTIONS Harvard University's Accounts Payable department utilizes the Paymode-X® service offered by Bank of America Merrill Lynch to replace paper checks and other traditional electronic payments. We are asking our vendors and suppliers to enroll in Paymode-X so that all future payments are made electronically using this service. Harvard University will begin making payments to you electronically once you have enrolled and have been activated in Paymode-X. To learn more about Paymode-X, visit: https://www.paymode.com/harvarduniversity
Welcome	PAYMENT TERMS Please note, the following payment terms are associated with each payment method unless otherwise agreed to in a written agreement with Harvard University: Paymode-X: Net 30 Paper Check: Net 30
Company Overview ✓	
Business Details ✓	
Addresses ✓	
Contacts ✓	
Diversity ✓	
Tax Information ✓	
Payment Information ✓	What default payment method do you prefer? ★ <div></div>
Certify & Submit	
Registration FAQ View History	
	★ Required to Complete Registration
	<div>< Previous</div> <div>Next ></div> <div>Save Changes</div>

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.

Certify & Submit and Next Steps

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

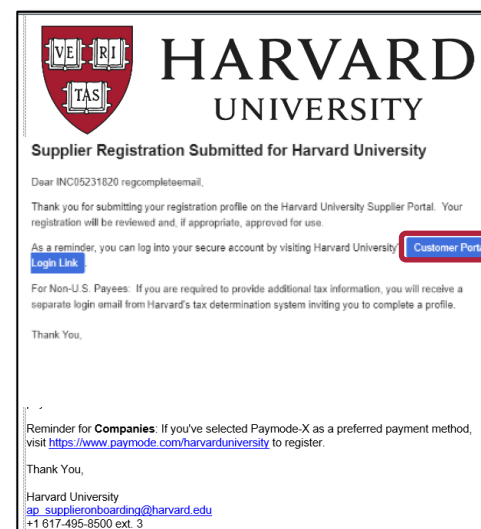
- **Select** the Certification box to certify that all information provided is true and accurate
- **Click Submit**

The screenshot shows the 'Certify & Submit' page of the Harvard University Supplier Registration portal. On the left, a sidebar lists sections: 'Test Registration' (7 of 7 Steps Complete), 'Welcome', 'Company Overview', 'Addresses', 'Contacts', 'Tax Information', 'Payment Information', and 'Additional International In...'. Each section has a green checkmark. The 'Certify & Submit' section is highlighted with a red box. It contains a 'Certification *' checkbox with the text 'I certify that all information provided is true and accurate.' and a 'Submit' button at the bottom right. The main content area shows a message: 'I have read the policy and procurement guidelines listed here. I certify on behalf of my organization that our company/principals have not been debarred, suspended, proposed for debarment, declared ineligible, or are not in the process of being debarred. Additionally, by submitting this registration, you certify all information provided is true and accurate. Knowingly providing false information may result in disqualifying you or your company from doing business with us.'

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>