



University of Delaware Supplier Portal

UDX Supplier Entity Self Registration Guide

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Self-Registration Overview

Invitation to Register

Welcome to the University of Delaware Supplier Portal (UD Exchange) powered by Jaggaer. To conduct business with the University, new, current or potential suppliers/payers must be invited to register through UD Exchange via an invitation to register from UD at UDexchange@jaggaer.com. If you have not received an invitation and expected one, please check your spam/junk and/or email procurement@udel.edu. **The University of Delaware does not allow unsolicited registrations.**

This Guide

This guide provides detailed information on the registration process. Use this guide along with the FAQ's and Help Text (?) within the portal to complete registration. Fields with an * are required. **If you have questions during the registration process, email UD at procurement@udel.edu. Note: Any RED instructions in this document are specifically for Foreign Suppliers. We will review your registration within 2-4 business days.** If we have questions we will email the contact provided in the contacts section of the registration. Upon registration approval, you will become an approved supplier for the University.

Documents and Information Required for Registration

- Basic business information (e.g. legal company name, legal structure, tax identification number)
- Tax, ordering, and remittance addresses
 - **Tax Address:** Legal address which must match W-9 or W-8)
 - **Receives Orders:** Address that fulfills orders (you may have multiple).
 - **Receives Payment:** Payment address must match the payment address on invoices.
- Primary contact information, including a designated contact for Purchase Orders (POs).
- NAICS codes and Dun & Bradstreet (DUNS) number, where applicable
- For foreign payees only; bank letter (required) and bank statement (optional)

Preferred Payment Method: The default (domestic) payment method is a physical check if no other payment method has been designated or if banking information cannot be verified. *Banking information must match banking information on invoices. All ACH payment methods are verified through a third-party verification system. Wire payments require bank letters for verification. (Bank statement is suggested.)*

W-9/W-8 IRS Form: Suppliers have the option of utilizing a pre-filled IRS form which can be signed using our integrated docusign tool or manually upload your signed form.

Certificate of Insurance: NOT required to complete registration but may be required for specific business engagements. UD encourages suppliers to upload their COIs and keep updated.

Jaggaer Portal

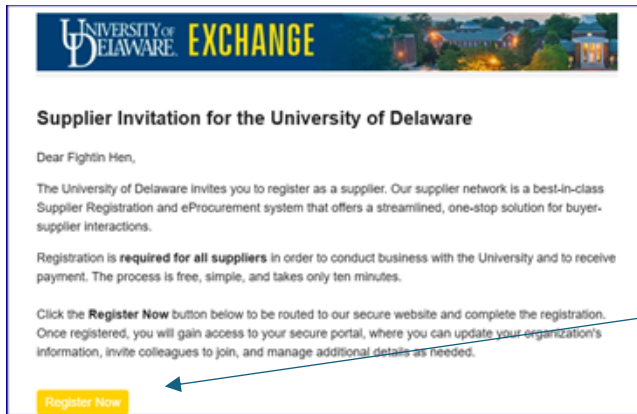
You may already have an account for the Jaggaer portal. Jaggaer operates with a "global identity" for suppliers, meaning your core company's information is stored under a single account. However, you must register separately for each customer's specific customer portal to manage that relationship.

Technical Resources

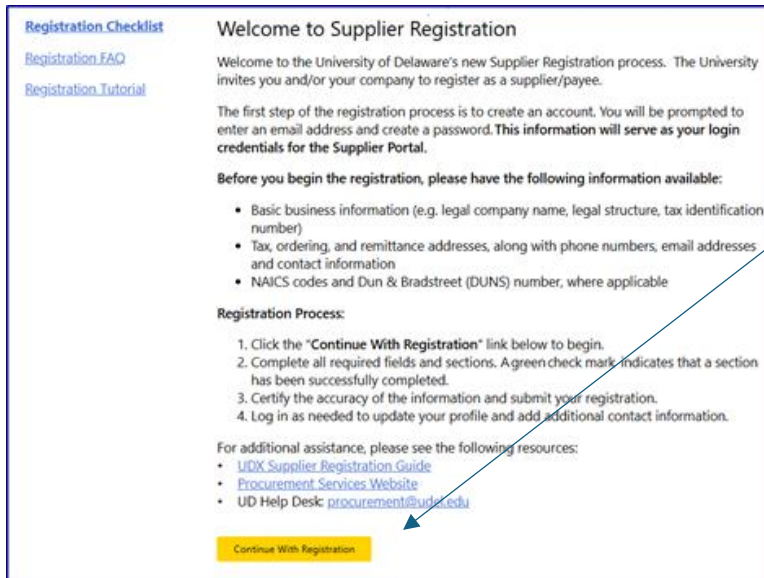
- Jaggaer support for technical issues: <https://jaggaer.my.site.com/SupplierSupportRequest/s/>

Creating a UDX Supplier Portal Account on the Jaggaer Platform

If you are a new supplier or individual doing business with the University OR a current supplier being invited to the UDX portal, you will receive an invitation from the UD Supplier Team at UDExchange@jaggaer.com. If you have not received an invitation and expected one, check your spam or junk folders and/or email procurement@udel.edu.



Click **Register Now** to begin. You must use the email address the invite was sent to when creating your log in. Do not use a different email or forward the invite.



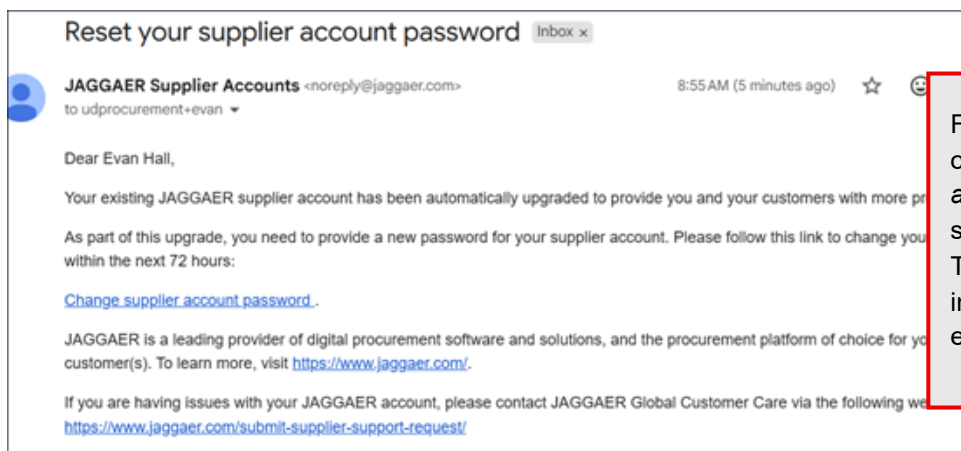
From this screen click **Continue with Registration**.

The registration information is pre-populated with the email/name information from your registration invite. Complete the registration, selecting **Create Account** when completed.

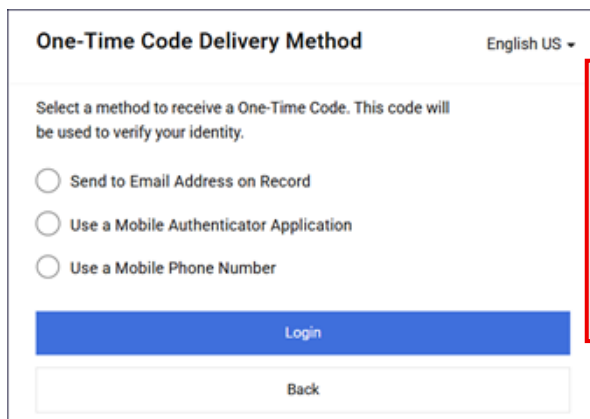
A Pop-Up will appear letting you know your account was successfully created and a link will be sent to your email from `noreply@jaggaer.com`.

IMPORTANT

Check if your organization already has a JSN record/Jaggaer portal log in. If yes, you can log in with those credentials, but you still must complete the UD registration process. Changes made to your JSN record will not update information in your UD record. Jaggaer Supplier Support Contact 1-800-233-1121



Follow all of the instructions on the *Reset your supplier account password* email to set up/change password. This email will be sent to the inbox where the invitation email was received.



Once you reset your password, a pop-up will appear asking where to send a verification code to verify your identity. **Enter the verification code in the "One-Time Code" screen** and submit to complete account setup.

Welcome to Supplier Registration

Fightin Hen

Registration In Progress for:
University of Delaware

3 of 9 Steps Complete

Welcome

Company Overview ✓

Business Details ▲

Addresses ▲

Contacts ✓

Insurance ✓

Payment Information ▲

Tax Information ▲

Additional Questions ▲

Comments ▲

Certify & Submit

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

Company Overview

The information entered on this page allows us to track general information about your company.

Doing Business As (DBA) ?

Country of Origin * ?

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

Legal Structure * ?

Tax ID Number *

Website

★ Required to Complete Registration

Once logged in, you are ready to complete registration. The supplier registration page is made up a series of sections, visible in the left-hand menu. Each section is followed by an attention symbol ▲.

Once the section is complete the symbol will be replaced with a green checkmark ✓.

The first screen will be the Welcome Tab. If your Legal Individual/Company name is correct, click **NEXT**. If it is incorrect or needs to be revised, make the appropriate change and click **NEXT**.

This name must match what is on your W-9/W-

Company Overview

(This page is also for Individuals but not all fields must be completed)

The screenshot shows the 'Company Overview' page for 'Fightin Hen'. The page is part of a registration process for the University of Delaware, with 3 of 9 steps completed. The 'Company Overview' section is highlighted in green in the left sidebar. The main content area contains the following fields:

- Doing Business As (DBA): Text input field.
- Country of Origin: Dropdown menu with 'United States' selected.
- Does your business have a DUNS number?: Radio buttons for 'Yes' and 'No' (selected).
- Legal Structure: Dropdown menu with 'C Corporation' selected. A blue arrow points to this field from a yellow tip box.
- Tax ID Number: Text input field.
- Website: Text input field with a refresh icon.

At the bottom right, there are three buttons: 'Previous', 'Next', and 'Save Changes'. A red box highlights the 'Save Changes' button with the text 'Click Save Changes when complete.' A yellow box contains the tip: 'TIP: Choose Legal Structure first!'. A grey box at the top right says 'See instructions below on how to complete the Company Overview fields.'

DBA: You may enter an *alternate* business name here. This name is an alternate name that you may be doing business as (or commonly known by) but is *not* your Legal Company Name. Individuals cannot have a DBA. **The DBA must be included on line 2 of your W-9.**

Country of Origin: Country of origin is the country you use for Tax Purposes. U.S. citizens and Permanent Residents should select United States.

Legal Structure:

- **Individual:** If you are an **INDIVIDUAL** (including if you are a student) choose **Individual/Sole Proprietor or Single-Member LLC**. **Foreign individuals choose Foreign Individual.**
- **Entity:** Choose the appropriate Legal Structure information as stated by the IRS for your organization. For more information about business structures, please visit www.irs.gov. **Your legal structure must match the box selected in Line 3a of your W-9.**
- **Foreign entities choose Non-US Based entity.**

Tax ID Number

- U.S. citizens or entities: Enter U.S. Taxpayer Identification Number (Social Security number or EIN). Use numeric characters only. If your Tax Identification number has changed, you must submit a new W-9. **Your Tax ID must match the Tax ID on your W-9.**
- **Foreign entities or individuals:** Enter a U.S. Taxpayer Identification Number (Social Security number or EIN) if you have one OR a foreign SSN. You may leave blank if you are from a jurisdiction that does not issue Tax Identification numbers.

Website: If you are a business entity and have a website, enter the homepage URL.

Completing Business Details

Fightin Hen
Registration In Progress for University of Delaware
4 of 9 Steps Complete

Business Details

If you are an individual, you do not need to complete this page. If you are completing this as a Sole Proprietor, these fields are optional.

Year Established

Number of Employees

Products and Services

★ Required to Complete Registration

◀ Previous Next ▶ Save Changes

This page appears for individuals. Individuals can skip this page. If you are registering as a Sole Proprietorship, you can (but are not required) to complete these fields.

Fightin Hen
Registration In Progress for University of Delaware
3 of 9 Steps Complete

Business Details

If you are an individual, you do not need to complete this page. If you are completing this as a Sole Proprietor, these fields are optional.

Year Established

Number of Employees

Products and Services

NAICS Codes * No Primary NAICS Code Selected

Commodity Codes *

★ Required to Complete Registration

◀ Previous Next ▶ Save Changes

This page appears for entities and must be completed.

NAICS Codes: Use search or drill down to select.

Commodity Codes: Use search or browse list to select the appropriate commodity code for what you are providing to the University. If you have questions about what commodity code you should select, reach out to the department you are doing business with to help determine what code you should select.

Click **Next** to proceed to Addresses section.

Adding Addresses

DO NOT DELETE OR EDIT OR OVERWRITE ANY CURRENT ADDRESSES IN YOUR RECORD. ONLY ADD NEW ADDRESSES IF NEEDED!

University of Delaware requires three 3 types of addresses. They can all be the same or different.

Tax Address

1. Takes Orders
2. Receives Payment

Click **Add Address**, a new window will appear.

Label each address with its street address.

This example shows 1 single address chosen for **all 3 address types**. Note: The same address is not entered multiple times. You do not need to duplicate them. Check all boxes that apply.

This example shows adding an additional **Receives Payment** location

Add Address

Address Details (Step 2 of 2) ?

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

Country *

Address Line 1 *

Address Line 2

Address Line 3

City/Town *

State/Province

Postal Code

* Required to Complete Registration

← Previous **Save Changes**

This email will receive purchase orders.

Be sure to enter information into each required field.

Click **Save Changes** when done.

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

Click **Save Changes** to skip this step and Add Address.

* Required to Complete Registration

← Previous **Save Changes**

Choose NOT APPLICABLE when the Address/Contact box appears. **Do NOT add contact information for each address.** You will add contact information for the entire profile in the CONTACTS section.

Adding Contacts

Cori Cozzens
Supplier Number:0000054847

Registration **Complete** for:
University of Delaware

Welcome

Company Overview ✓

Business Details ✓

Addresses ✓

Contacts ✓

Insurance ✓

Payment Information ✓

Tax Information ⚠

Additional Questions ⚠

Comments ✓

Contacts

Please enter contact information for individual person when needed. Do not associate this

No contacts have been entered

Add Contact ▼

- Catalog
- Corporate
- Customer Care
- PO Failure
- Sales
- Technical
- Other

Click on **Add Contact** drop down to choose contact type. You may add a single contact OR multiple contacts.

Contact Label should be First and Last Name

Add Contact

Contact Label *

Which of the following business activities apply to this contact?
Customer Care

First Name *

Last Name *

Position Title

Email *

Phone * ext.

Mobile Number

Toll Free Phone ext.

Fax ext.

* Required to Complete Registration

Save Changes

Contacts Legend

Catalog: Main point of contact for catalog content, pricing, and updates related to hosted catalogs or punchout integrations.

Corporate: General or headquarters contact for company-level inquiries that are not tied to a specific function or order.

Customer Care: Primary support contact for order status, returns, invoicing issues, and general supplier service questions.

PO Failure: Designated contact for issues related to purchase order transmission failures (e.g., failed cXML, incorrect routing, EDI errors).

Sales: Assigned sales representative or account manager responsible for pricing, quotes, product information, and commercial/university relationship support.

Technical: Contact for technical troubleshooting or system integration support (e.g., UDX connectivity, portal access, file format issues).

Insurance Requirements

Cori Cozzens Supplier Number:0000054847		Insurance	
Registration Complete for: University of Delaware		The University requires outside parties providing services to the University or using University's PO terms and conditions, and upon request, Supplier shall furnish to Buyer a current certificate of insurance. If you are not currently insured, you can upload the appropriate insurance requirements in the portal.	
Welcome		<ul style="list-style-type: none"> • Click "Add Insurance" and enter all the required information • Repeat for additional insurance • Click "Next" to continue Additional Insurance Requirements 	
Company Overview	✓	If you provide catering services to the University, you will be required to provide Compensation Insurance. Upload the ACORD Certificate of Insurance.	
Business Details	✓	<hr/> <i>No Insurance has been entered.</i>	
Addresses	✓	<input type="button" value="Add Insurance"/>	
Contacts	✓		
Insurance	✓		
Payment Information	✓		
Tax Information	⚠		
Additional Questions	⚠		
Comments	✓		

This section is not required for registration, but depending on the service provided, insurance verification may be requested at a later time.

Accounts Payable

Payment Method Overview

Each payment option has unique onboarding/verification requirements. Please read below before choosing a payment option.

- Payment method refers to the options available to make payment to suppliers/payees.
- Payment method influences the supplier's/payee's payment terms unless contractual terms exist
- Payment methods are indicated during the supplier registration process.

Check: Available for domestic payments only. Physical check mailed to specific payment address.

Direct Deposit/ACH: Available for domestic accounts only.

- We utilize a third party to verify domestic banking information. If your banking cannot be verified, we will ask for alternative banking information. Lack of verification does not mean there is an issue with your account, only that we cannot complete verification.
- If you do not respond or do not have alternate banking information to provide, we will revert payment to physical check.

Wire Transfer: Available for foreign suppliers only with foreign bank accounts.

- When choosing this method, you must upload a bank letter! A bank statement is suggested but not required. Your record will not be approved if these documents are not uploaded. *(Documents must be PDF format readable by Adobe Acrobat)*
 - Bank Letter: Name, address, bank account number
 - Bank Statement: Includes bank name, account number, bank address, your address
- Domestic suppliers cannot choose this option. UD does not make domestic wire payments.

Important Payment Notes

- Currency on all invoices must match the currency indicated on the related purchase order.
- Payments are not permitted through PayPal, Venmo or other similar money transfer services.
- Banking information submitted for ACH or international wire payments requires 3rd party verification. UD reserves the right to revert the payment method to physical check drawn in US funds if bank verification is not successful.
- Multiple payment methods may be included in a supplier record. Each method must be tied back to a specific payment address from the "Address" section.
- The University only makes payment directly to the supplier engaged in a transaction, which must match the entity name provided on any invoice. We do not permit 3rd party payments to another legal entity, even if it is a different division of the same company.

Click on **Add Payment Information** to choose payment method.

If you are including foreign wire information, upload your bank verification documents here.

If you are interested in the Virtual Payables option, click **YES** and we will contact you with additional information.

Check Payment

Adding Check Payment.

Payment Title: Must be Check

Country: Country of citizenship or entity incorporation. *Foreign entities can only choose check if payment can be accepted by physical check drawn in US currency.

Remittance Address: If multiple remittance addresses exist, choose the address this account is associated with

Currency: USD

Active: Do not change

ACH Payment

Adding ACH Payment

Payment Title: Must be ACH

Country: Country of citizenship/business registration

Direct Deposit Format: Must be CCD

Remittance Address: If multiple remittance addresses exist,

Wire Payment

- **If you choose Wire Payment, a Bank Letter is required to be onboarded and approved as a supplier. A Bank statement is not required, but highly recommended. (Documents must be PDF format readable by Adobe Acrobat.)**
1. **Bank Letter:** In English, on bank letterhead, dated with bank name, address and signature of authorized bank official, account holder name, account number or IBAN, SWIFT/BIC code
 2. **Bank Statement:** In English, statement issue date, account holder name, address, account number or IBAN, SWIFT/BIC code

Add Payment Information

Only associated countries are displayed.

Payment Title * Wire

Country * Kenya

Payment Type * Wire Transfer

Remittance Address * Edit

Electronic Remittance Email *

Currency * USD

Active Yes No

Bank Account

Procurement Use Only

Wire Account Verification

Wire External Wire SWIFT/BIC

Wire External Wire Account

Wire Intermediary Bank SWIFT/BIC

* Required to Complete Registration

Save Changes Close

Adding Wire Payment

Payment Title: Must be WIRE

Country: Country of citizenship/business registration

Payment Type: Wire Transfer

Remittance Address: If multiple remittance addresses exist, choose the address this account is associated with

Currency: USD **Active:** Yes

Country: Country where bank is located

Bank Name: Correct bank name

Account Holder Name: Legal name or DBA. If registered as a Sole Proprietor, this must be DBA name

Account Type: Choose checking or savings

Account Number Type: Choose account number or iBAN

SWIFT/BIC: Must include **IRC:** Optional

Adding Tax Information

A NEW Tax form is required when changing:

- Legal name or DBA
- Tax address
- Tax classification

Tax Form Requirements

Submission of valid IRS tax documentation is required for supplier onboarding and payment. For guidance on selecting and completing the appropriate W-9 or W-8 form, visit www.irs.gov.

- **U.S. citizens, U.S. entities, and Resident Aliens** must submit **Form W-9**.
- **Foreign citizens, foreign entities, and Nonresident Aliens** must submit **Form W-8** (W-8BEN-E, W-8ECI, W-8EXP, or W-8IMY, as applicable).
 - **Note:** IRS W-8 forms expire three (3) years from the date of signature. A new, updated form must be submitted upon expiration.

There are 2 options for submission of your Tax Document:

1. **Prefilled Document & Docusigned (preferred):** A system-generated, pre-populated tax document is available by selecting: Add Tax Document → Select Tax Document Type → Select Tax Document Year → Sign Document
2. **Manually Uploaded Document:** Upload a completed tax form by selecting: Add Tax Document → Select Tax Document Type → Check “Manually upload the document instead” → Select File or Download the Pre-populate Tax Document and sign to upload

All manually uploaded documents must meet the following requirements:

- Current IRS revision version
- Signed and dated within the last 365 days
- PDF format and readable in Adobe Acrobat
- Electronically signed (per IRS guidelines) or wet-signed forms are acceptable

Document Type → Select Tax Document Year → Sign Document

2. Manually Uploaded Document: Upload a completed tax form by selecting: Add Tax Document → Select Tax Document Type → Check “Manually upload the document instead” → Select File or Download the Pre-populate Tax Document and sign to upload

All manually uploaded documents must meet the following requirements:

- Current IRS revision version
- Signed and dated within the last 365 days
- PDF format and readable in Adobe Acrobat
- Electronically signed (per IRS guidelines) or wet-signed forms are acceptable

The **Tax Document Name** should match the form type (e.g., W-9, W-8BEN-E) and select the appropriate document type.

IMPORTANT: You may see documents posted by the University's Supplier team. These documents are for your review or action.

Required Information
The following tax document are required to complete registration:

- W-9

No tax information has been entered

Add Tax Document

Click on **Add Tax Document**

Domestic individuals/entities will only see a W-9. **Foreign individuals/entities** will be shown a list of W-8s to choose from.

Name Tax Document using format below

Doc Type Supplier Name YYYYMMDD

Example

W-9 Milo Smith 20260122

Option 1: Prefilled Tax Document

Add Tax Document ✕

Tax Type ★ W-9

Tax Document Name ★

Tax Document Year ★

Signature Status Not Signed

Tax Documentation ★

Manually upload the document instead

★ Required to Complete Registration

Choose **Sign Document** for **Option 1, Prefilled Document**. This takes you to the docusign application

docusign

Please read the [Electronic Record and Signature Disclosure](#).

I agree to use electronic records and signatures. *

Change Language - English (US) v

Other Options v

Choosing **Sign Document** enables Docusign agreement page. Click **I agree**

DocuSign Envelope ID: CRDE175D-0AB0-8DAF-8050-A49070B214EF

DEMONSTRATION DOCUMENT ONLY
PROVIDED BY DOCUSIGN ONLINE SIGNING SERVICE
909 3rd Ave, Suite 1700 • Seattle • Washington 98104 • (206) 219-0200
docusign.com

Start

Form W-9
(Rev. March 2004)
Department of the Treasury
Internal Revenue Service

Request for Taxpayer Identification Number and Certification
Go to www.irs.gov/FormW9 for instructions and the latest information.

Give form to the requester. Do not send to the IRS.

Before you begin: For guidance related to the purpose of Form W-9, see *Purpose of Form*, below.

1 Name of entity/individual. An entry is required. (For a sole proprietor or disregarded entity, enter the owner's name on line 1, and enter the business/disregarded entity's name on line 2.)

Rainy Night Inc

2 Business name/disregarded entity name, if different from above.

3a Check the appropriate box for federal tax classification of the entity/individual whose name is entered on line 1. Check only one of the following seven boxes.

Individual/sole proprietor C corporation S corporation Partnership Trust/estate

LLC. Enter the tax classification (C = C corporation, S = S corporation, P = Partnership)

Note: Check the "LLC" box above and, in the entry space, enter the appropriate code (C, S, or P) for the tax classification of the LLC, unless it is a disregarded entity. A disregarded entity should instead check the appropriate box for the tax classification of its owner.

Other (see instructions)

3b If on line 3a you checked "Partnership" or "Trust/estate," or checked "LLC" and entered "P" as its tax classification, and you are providing this form to a partnership, trust, or estate in which you have an ownership interest, check this box if you have any foreign partners, owners, or beneficiaries. See instructions

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any)

Exemption from Foreign Account Tax Compliance Act (FATCA) reporting code (if any)

(Applies to accounts maintained outside the United States.)

5 Address (number, street, and apt. or suite no.). See instructions. Requester's name and address (optional)

6 City, state, and ZIP code

7 List account number(s) here (optional)

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. See also *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and, generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Signature of Sign

DOMESTIC SUPPLIERS

Your prepopulated W-9 appears in a separate browser.

-Click **Start**.

-View/verify that information is correct.

-If everything correct, scroll to signature line.

-Click on the **Sign icon** to create a digital signature and click **Finish**.

Form **W-8BEN** Certificate of Foreign Status of Beneficial Owner for United States Tax Withholding and Reporting (Individuals)
(Rev. October 2007) For use by individuals. Entities must use Form W-8BEN-E.
Department of the Treasury Internal Revenue Service Go to www.irs.gov/FormW8BEN for instructions and the latest information.
OMB No. 1545-1021 Give this form to the withholding agent or payer. Do not send to the IRS.

Do NOT use this form if:

- You are NOT an individual.
- You are a U.S. citizen or other U.S. person, including a resident alien individual.
- You are a beneficial owner claiming that income is effectively connected with the conduct of trade or business within the United States (other than personal services).
- You are a beneficial owner who is receiving compensation for personal services performed in the United States.
- You are a person acting as an intermediary.

Instead, use Form:

- W-8BEN-E
- W-9
- W-8EC
- 8233 or W-4
- W-8BFW

Note: If you are resident in a FATCA partner jurisdiction (that is, a Model 1 IGA jurisdiction with reciprocity), certain tax account information may be provided to your jurisdiction of residence.

Part I Identification of Beneficial Owner (see instructions)

1 Name of individual who is the beneficial owner

2 Country of citizenship

Freely Foreign

3 Permanent residence address (street, apt. or suite no., or rural route). Do not use a P.O. box or in-care-of address.

Check/ate Court

4 City or town, state or province, include postal code where appropriate. Country

5 Mailing address (if different from above):

City or town, state or province, include postal code where appropriate. Country

6 U.S. taxpayer identification number (SSN or ITIN), if required (see instructions)

7 Foreign tax identifying number (see instructions)

8 Check FATIN not legally required

9 Reference number(s) (see instructions)

10 Date of birth (MM-DD-YYYY) (see instructions)

Part II Claim of Tax Treaty Benefits (for chapter 3 purposes only) (see instructions)

11 I certify that the beneficial owner is a resident of _____ within the meaning of the income tax treaty between the United States and that country.

12 Special rates and conditions (if applicable—see instructions): The beneficial owner is claiming the provisions of Article and paragraph _____ of the treaty identified on line 9 above to claim a _____ % rate of withholding (specify type of income): _____

Explain the additional conditions in the Article and paragraph the beneficial owner meets to be eligible for the rate of withholding: _____

Part III Certification

Under penalties of perjury, I declare that I have examined the information on this form and to the best of my knowledge and belief it is true, correct, and complete. I further certify under penalties of perjury that:

- I am the individual that is the beneficial owner or an authorized signatory for the individual that is the beneficial owner of all the income or proceeds to which this form relates or am using this form to document input for chapter 3 purposes.
- The person named on line 1 of this form is not a U.S. person.
- This form relates to:
 - (a) Income not effectively connected with the conduct of a trade or business in the United States;
 - (b) Income effectively connected with the conduct of a trade or business in the United States but is not subject to tax under an applicable income tax treaty;
 - (c) The gross amount of a partnership's effectively connected taxable income, or

Foreign Individuals-Important!

Your prepopulated W-8BEN appears in a separate browser. Some required sections are NOT pre-populated and must be completed by you. These are **BOLDED** below.

Part I

- Section 1: Legal Name
- Section 2: Country of Citizenship
- Section 3: Permanent address
- Section 4: Mailing address if applicable
- Section 5: US Tax ID (must provide if have one)

Part II

- Complete if applicable

Part III

- Certify, date and sign
- Print name of signer

Reminder! Once all fields are completed, view/verify that information is correct. Click on the **Sign icon** to create a digital signature and click **Finish**.

Foreign Entities-Important!

Your prepopulated W-98BENE appears in a separate browser. Some required sections are NOT pre-populated and must be completed by you. These are **BOLDED** below.

Form **W-8BEN-E**

Certificate of Status of Beneficial Owner for United States Tax Withholding and Reporting (Entities)

OMB No. 1545-1621

(Rev. October 2021)
Department of the Treasury
Internal Revenue Service

For use by entities. Individuals must use Form W-8BEN. Section references are to the Internal Revenue Code.
Go to www.irs.gov/FormW8BEN-E for instructions and the latest information.
Give this form to the withholding agent or payer. Do not send to the IRS.

Do NOT use this form for:

- U.S. entity or U.S. citizen or resident **W-9**
- A foreign individual **W-8BEN (Individual)** or Form 8233
- A foreign individual or entity claiming that income is effectively connected with the conduct of trade or business within the United States (unless claiming treaty benefits) **W-BECI**
- A foreign partnership, a foreign simple trust, or a foreign grantor trust (unless claiming treaty benefits) (see instructions for exceptions) **W-BMY**
- A foreign government, international organization, foreign central bank of issue, foreign tax-exempt organization, foreign private foundation, or government of a U.S. possession claiming that income is effectively connected U.S. income or that is claiming the applicability of section(s) 1152), 501(c), 892, 895, or 1443(b) (unless claiming treaty benefits) (see instructions for other exceptions) **W-BECI or W-EXP**
- Any person acting as an intermediary (including a qualified intermediary acting as a qualified derivatives dealer) **W-BMY**

Instead use Form:

Part I Identification of Beneficial Owner

1 Name of organization that is the beneficial owner
Freddy Foreign

2 Country of incorporation or organization
OH

3 Name of disregarded entity receiving the payment (if applicable, see instructions)

- 4** Chapter 3 Status (entity type) (Must check one box only):
- | | | | |
|--|--|---|---|
| <input type="checkbox"/> Simple trust | <input type="checkbox"/> Tax-exempt organization | <input type="checkbox"/> Corporation | <input type="checkbox"/> Partnership |
| <input type="checkbox"/> Central Bank of Issue | <input type="checkbox"/> Private foundation | <input type="checkbox"/> Complex trust | <input type="checkbox"/> Foreign Government - Controlled Entity |
| <input type="checkbox"/> Grantor trust | <input type="checkbox"/> Disregarded entity | <input type="checkbox"/> Estate | <input type="checkbox"/> Foreign Government - Integral Part |
| | | <input type="checkbox"/> International organization | |

If you intend disregarded entity, partnership, simple trust, or grantor trust above, is the entity a hybrid making a treaty claim? If "Yes," complete Part III. Yes No

- 5** Chapter 4 Status (FATCA status) (See instructions for details and complete the certification below for the entity's applicable status.)
- | | |
|---|---|
| <input type="checkbox"/> Nonparticipating FFI (including an FFI related to a Reporting IGA FFI other than a deemed-compliant FFI, participating FFI, or exempt beneficial owner). | <input type="checkbox"/> Nonreporting IGA FFI. Complete Part XII. |
| <input type="checkbox"/> Participating FFI. | <input type="checkbox"/> Foreign government, government of a U.S. possession, or foreign central bank of issue. Complete Part XIII. |
| <input type="checkbox"/> Reporting Model 1 FFI. | <input type="checkbox"/> International organization. Complete Part XIV. |
| <input type="checkbox"/> Reporting Model 2 FFI. | <input type="checkbox"/> Exempt retirement plans. Complete Part XV. |
| <input type="checkbox"/> Registered deemed-compliant FFI (other than a reporting Model 1 FFI, sponsored FFI, or nonreporting IGA FFI covered in Part XII). See instructions. | <input type="checkbox"/> Entity wholly owned by exempt beneficial owners. Complete Part XVI. |
| | <input type="checkbox"/> Territorial financial institution. Complete Part XVII. |
| | <input type="checkbox"/> Excepted nonfinancial group entity. Complete Part XVIII. |
| | <input type="checkbox"/> Excepted nonfinancial start-up company. Complete Part XIX. |

Edit Tax Document ✕

Tax Type ★ W-9

Tax Document Name ★

Tax Document Year ★

Signature Status AdobeSigned

Tax Documentation ★ [Signed Document](#)

Manually upload the document instead

★ Required to Complete Registration

After clicking on Finish using the docusign, the signed form will automatically attach to the registration. Click **Save Changes**.

rainy Night Inc

Registration In Progress for: University of Delaware

1 of 8 Steps Complete

- Welcome
- Company Overview
- Business Details
- Addresses
- Contacts
- Insurance
- Payment Information
- Tax Information**
- Comments
- Verify & Submit

Registration FAQ | View History

Tax Information ?

The submission of valid IRS Tax documents is required for onboarding and payment. For more information on choosing and completing the correct W-9 or W-8 form, visit www.irs.gov.

- US citizens and entities and Resident Aliens must submit form W-9.
- Foreign citizens and entities or Nonresident Alien must submit form W-8 or W-8BEN-E, W-8ECI, W-8EXP, W-8IMY. Note: IRS W-8 forms expire 3 years from the date of signing, at which time a new, updated form must be submitted.
- **IMPORTANT: A NEW Tax form is required for any change of Legal name or DBA, Tax address, Tax classification, Tax identification number**

There are 2 choices for submission of your Tax Document:

Prefilled Document: The preferred tax document submission is a pre-populated document generated by the system. This is available after clicking **Add Tax Document/Selecting your tax document type/Download pre-populated tax document**.

Manually Uploaded Document: This option requires a complete, uploaded tax document. This alternate option is available by choosing **Add Tax Document/Select File**. All documents uploaded to this site must be:

- Current IRS revision version and signed and dated within the last 365 days
- PDF format readable by Adobe Acrobat
- Electronic or wet signed documents are acceptable

Name the form based on its type (W-8BEN-E, W-9) in the Tax Document Name field and select the year the form was signed from the Tax Document Year drop-down menu.

IMPORTANT! You may see documents here posted by the University's Supplier team. You do NOT need to review these documents. These documents are necessary for verification and onboarding.

Tax Document Name	Tax Type	Tax Document Year	Tax Documentation	e-Signed	Signature Status
W9_Rainy Night2025	W-9	2025	View Document	✓	DocuSigned

Your tax form now appears in your record and status shows e-docusigned. Click **Next** to proceed to Comments section.

Option 2: Manually Uploaded Tax Document

This option requires a complete, uploaded tax document. If you choose this alternate option, your document must be:

- Current IRS revision version and signed and dated within the last 365 days
- PDF format readable by Adobe Acrobat
- Electronic or wet signed documents are acceptable

IMPORTANT! You may see documents posted by the University's Supplier team. You do not need to review these documents. These documents are necessary for our verification and onboarding processes.

Add Tax Document

Tax Type * W-9

Tax Document Name *

Tax Document Year *

Signature Status Not Signed

Tax Documentation * *Drop file to attach, or browse.*

[Download Pre-populated Tax Document](#)

Manually upload the document instead

* Required to Complete Registration

Name Tax Document

W-9 or W-8 NAME DATE *use format YYYYMMDD*

Choose **Manually Upload** for **Option 2, Manually Uploaded Document**. This enables you to upload a signed tax form.

Your tax document now appears and status shows **NOT** e-signed by system.

Click **Next** to proceed to Comments section.

Tax Document Name	Tax Type	Tax Document Year	Tax Documentation	e-Signed	Signature Status	
W9_UDFriends2025	W-9	2025	View Document	✘	Not Signed	<input type="button" value="Edit"/>

Additional Questions

Complete the additional questions. If you answer **YES** to any of these questions, we may contact you for additional information.

Cori Cozzens Supplier Number:0000054847	Additional Questions
Registration Complete for: <i>University of Delaware</i>	Answers to the questions below are required in order to adhere to our Conflict of Interest policy. Depending on your responses, we may contact you for additional details.
Welcome	Are you currently a student registered in a matriculated degree program or a current employee of the University of Delaware, including adjunct faculty, miscellaneous wa and others receiving payments through the UD payroll system? *
Company Overview	<input type="text"/>
Business Details	Have you ever been involved in Federal debarment proceedings, or identified as being subject to economic and trade sanctions based on U.S. foreign policy and national security goals against targeted foreign countries or regimes? *
Addresses	<input type="text"/>
Contacts	<input type="text"/>
Insurance	
Payment Information	
Tax Information	
Additional Questions	
Comments	★ Required to Complete Registration
	Save Changes

Completing Comments

UD Friends Inc

Registration **In Progress** for:
University of Delaware
4 of 8 Steps Complete

Welcome

Company Overview ✓

Business Details ▲

Addresses ▲

Contacts ✓

Insurance ✓

Payment Information ▲

Tax Information ✓

Comments ▲

Certify & Submit

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

★ Required to Complete Registration

What area(s) was updated with this request? ★

Provide any additional comments below if needed

500 characters remaining

Click **Next to proceed to Certify and Submit section.**

Certify and Submit

Certify & Submit

Type your name in the box below acknowledging that you are a company representative authorized to submit this registration request. It is the Supplier's responsibility to keep their company information up-to-date. Inaccurate information may result in payment delays or deactivation of your record. Additionally, by submitting this registration, you certify all information is true and accurate. Knowingly providing false information may result in disqualifying you or your company from doing business with the University of Delaware, and may be subject to penalty or prosecution.

Preparer's Name ★

Preparer's Title ★

Preparer's Email Address ★

Today's Date

Certification ★ I certify that all information provided is true and accurate, and understand that I am providing this information with third party verification services. UD reserves the right to reject information that does not verify through our standard processes.

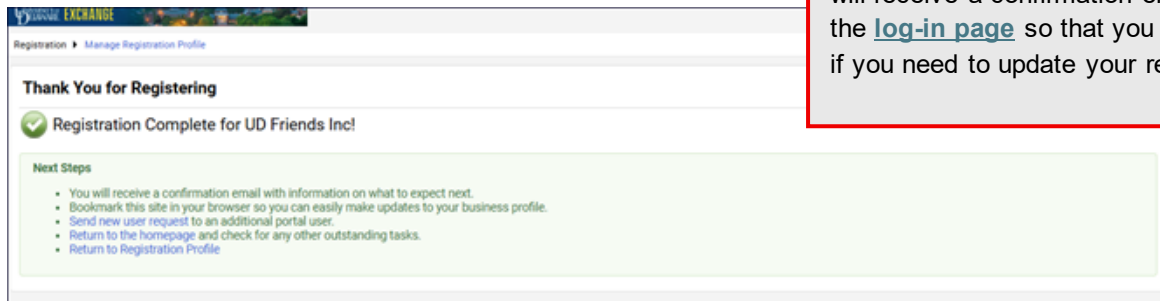
Make sure all fields on this page are complete. If you have not completed all required fields, you will be asked to go back and complete those sections before your registration can be submitted.

Check the box for **"I certify that all information is true & accurate."**

Click **Submit to complete registration**

★ Required to Complete Registration

Registration Complete Email



Once your registration is completed, you will receive a confirmation email. Bookmark the [log-in page](#) so that you can return to it if you need to update your record.

UDX Supplier Portal Log in Page

**Reminder, you may be utilizing the Jaggaer portal for multiple customers/universities. Be sure to navigate to your University of Delaware registration page.

The screenshot shows the 'Customer Portal Home' page. On the left, there is a 'Welcome to the University of Delaware Supplier Portal' section with several paragraphs of text and links. The main content area on the right is divided into four sections: 'Quick Links to Common Tasks' with a 'Manage Registration Profile' link; 'Sourcing Events' with a 'Show' dropdown menu set to 'Opening or Closing Soon' and 'No Results' displayed; 'Contracts' with 'No Results' and a 'View All Contracts' link; and 'Find Invoice' with an 'Advanced Search' link and an 'Invoice Number(s)' search field. A red-bordered callout box on the right side of the page contains the text: 'Once logged in to the [UDX Supplier Portal](#) this home page will appear, click **Manage Registration Profile** to return to view/edit your University of Delaware registration.'