NEW SUPPLIER REGISTRATION

US Individual Supplier

Office of Central Procurement
PSU suppliers@psu.edu
Welcome!

This document is used to provide examples and guidance for some of the questions that individuals will see as they progress through the registration process.

This document captures most of the required questions, indicated on the form by a red asterisk (*).

There may be additional questions that appear based on the selections made.

If at any time you need to exit the application, you may hit Save and Exit at the bottom of the page. Once you are ready to complete the application, you may resume where you left off.

General Help:
For assistance with registering, please visit the General Help link below or contact PSUsuppliers@psu.edu.

https://community.paymentworks.com/payees/s/topic/0TO3k000001uFcNGAU/completing-your-registration

Submitting a Support Ticket:
For technical assistance, please submit a Support Ticket with Payment Works.

https://community.paymentworks.com/payees/s/contactsupport
Select that you are registering as an Individual.

Select SSN to enter your name as you report your taxes. Then enter your social security number.
Select Yes and PaymentWorks will generate an electronic W-9 for your record. Only select No if you already have one completed that you would prefer to use and upload.

**Generate Electronic W-9**

When you use PaymentWorks, we will create an IRS form W-9 for you automatically, unless you opt out. Electronic W-9’s are convenient for you and provide enhanced security for your information. You may wish to opt out of electronic W-9 generation if you have any exemptions (Section 4) or specific signature requirements (see instructions on page 4 and 5 of the W-9).

- Yes
- No

**Form W-9 Certifications**

You have chosen to submit your Form W-9 electronically. Please confirm the following certifications:

**Tax ID Type**

- The Tax ID number shown on this form is my correct taxpayer identification number

**Backup Withholding**

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.

**Citizenship**

- I am a U.S. citizen or other U.S. person

**Certification Instructions**

You must uncheck item 2 (“Backup Withholding”) 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 on page 3 of the [IRS form W-9](https://www.paymentworks.com/api/files/paymentworks/IRS_W9_blank_form.pdf)
Enter your name as you would like it printed on checks even if you prefer ACH direct deposit payment.

Also provide a valid phone number and email.

Note: PaymentWorks will call this number to validate banking information. It is best to use a number at which you can be easily accessed.
Provide your legal, physical address as it would be listed on your W-9.

Provide an address if you would like to receive payment and 1099s to a different location from above. (A PO Box for example.)
Please contact psusuppliers@psu.edu if you have questions related to the Additional Information section of the registration.

Note that there is a separate and additional process for caterers, bus charters, and entertainment suppliers to be placed on those Supplier Lists. View these requirements at the following link:

https://controller.psu.edu/vendors

Supplier Category *

To ensure proper tax reporting and for full completeness of the application, please choose the best selection that applies to how you are registering with Penn State.

If you complete this section as an International or US Individual and realize that was not the correct selection, you will need to reset this portion of the application.

To reset, you will need to select the individual option you originally chose as the classification. Then, select “Choose One” under the “If at any point an individual is classified as an employee to be paid via Payroll Services:

Select an Option *

US Individual

Please choose a selection that best applies to you *

If you would like to change the above Supplier Category Question to US or International Entity, please revise this question to show the option as “Choose One.”

If at any point an individual is classified as an employee to be paid via Payroll Services, they will be prompted to not proceed with the online enrollment. If that happens, they should contact psusuppliers@psu.edu for further direction.

Select an Option *
Additional Information

All fields marked with a red asterisk (*) are required fields.
All other fields are optional.

Read the question and provide the most appropriate response(s).
If none of them apply, you must select “None of these statements are true”

1099 Tax Information for Individuals

Are you being paid for any of the following?*

☐ Royalties or broker payments in lieu of dividends or tax-exempt interest
☐ Rents
☐ Services performed by someone who is not your employee
☐ Prizes and awards
☐ Other income payments
☐ Medical and healthcare payments
☐ Crop insurance proceeds
☐ Cash payments for fish (or other aquatic life) you
☐ purchase from anyone engaged in the trade or business of catching fish
☐ Cash paid from a notional principal contract to an individual or partnership or estate
☐ Payments to an attorney
☐ Any fishing boat proceeds
☐ Nonemployee compensation (self-employment income)
☐ None of these statements are true

Are you or are you aware of anyone at your organization this is a current or past employee in the University Payroll System? *

Select an Option *

Are you or are you aware of anyone at your organization that was on record as an employee of the University any time during the last twelve months? *

Select an Option *

To the best of your knowledge, will the University hire this individual as an employee immediately following the termination of this service? *

Select an Option *

Do you, or does anyone at your organization know if they will provide the same or similar services while an employee? *

Select an Option *
Additional Information

All fields marked with a red asterisk (*) are required fields.
All other fields are optional.

Read the questions and provide the most appropriate response.

To the best of your knowledge, is the individual a Guest Lecturer who lectures at only a few sessions for a week or less during the calendar year?*

Select an Option *

Do you know if they will be teaching more than a week?*

Select an Option *

Are you or is anyone at your organization aware if the individual will provide the same or similar services to other entities or to the general public as part of a trade or business?*

(e.g. had Federal ID#, letterhead, invoices, advertising, etc.)

Select an Option *

Are you or is anyone at your organization aware if the University will provide the specific instructions regarding the performance of the required work rather than rely on the individual's expertise?*

Select an Option *

Will the University set the number of hours and/or days of the week that the individual is required to work, as opposed to allowing the individual to set own work schedule?*

Select an Option *
Additional Information

All fields marked with a red asterisk (*) are required fields.
All other fields are optional.

NAICS Codes *
https://www.naics.com/ Please enter the NAICS codes that indicate the types of goods you will be providing. Input N/A if these do not apply

Enter N/A
Enter Text Here *

Cage Codes *
https://cage.dla.mil/ Please enter the Cage codes that apply. Input N/A if these do not apply

Enter N/A
Enter Text Here *

Are you registered in SAM.GOV? *

SAM.gov site
If awarded a Purchase Order via Federal Funds a Supplier will be required to register with SAM.GOV *

Select No
Select an Option *

Purchase Order Information

Do you accept Purchase Orders? *

Select No
Select an Option *
Read the questions and provide the most appropriate response.

Select ACH if you would like to receive direct deposit to a US Bank.

Use the comment box to explain any of the Conflict of Interest questions you may have answered with “Yes” or any other information on the form you feel may need clarified. (US citizen living abroad for instance.)
Provide bank account information for ACH payment. This must be a beneficiary bank and not an intermediary.

Note: the name on this application needs to appear on the bank account.

A bank validation document must be provided.

Read the statement and check the box if you agree for Penn State to deposit money into your account.
Provide the address for your financial institution.

**Bank Address**

All fields marked with a red asterisk (*) are required fields.

All other fields are optional.

**What’s Next?**

Once your application is submitted, it will be reviewed by PaymentWorks for accuracy then go through a second review by the Penn State Supplier Team. The review process generally takes a few days, but timing will vary depending on accuracy of the information provided and current application volume. If you have any questions about the process, please email PSUsuppliers@psu.edu.

Thank you!