Supplier/Payee Portal - Individual Registration Guide

Welcome to the University of Pennsylvania’s Supplier/Payee Portal where you will begin your registration process with the ability to maintain your account information. All individual payees (except Independent Contractors) must be onboarded into the University’s database in order to receive payment.

These instructions are offered as guidance for completing your Individual Registration on the Penn Marketplace Supplier/Payee portal. Upon receipt of a Supplier/Payee registration invitation from University of Pennsylvania (support@sciquest.com), new suppliers/payees may register in the supplier portal, using your login credentials. Once you have been approved by Purchasing Services and your account has been created in the Penn financial system, you can log in to update your information at: https://solutions.sciiquest.com/apps/Router/SupplierLogin?CustOrg=UPENN.

To access your custom profile, click on the “Register Now” link from your invitation email. The link will take you directly to a profile that has been created for you. Please do not try to enter the portal any other way, as you will not be able to access your custom profile.

Penn's Invitation to Register Emailed to Supplier/Payee

Individual Invitation for University of Pennsylvania

Dear JOHN GREGG,

University of Pennsylvania has invited you to register as a payee.

Please take a moment to complete the registration process. By selecting the "Register Now" button below, you will be routed to a secure website to complete the registration process. Upon successful completion of your registration, you will have access to your secure portal to enable your prompt payment.

Register Now

Thank You,

University of Pennsylvania

If you have any technical questions, please contact Purchasing Services Operations Center at SupplierSupport@upenn.edu or +1.215.898.7216 for assistance and identify yourself as registering in the University of Pennsylvania Supplier Portal.
Continue with Registration:

Welcome to Supplier Registration

Welcome to the Penn Marketplace Portal. We will manage your payments to you through this site. Please provide all the required details that are designated by the asterisk.

CONTINUE WITH REGISTRATION

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.

Account Registration Page
Once you have created an account, you then can log back in at any time to update information through the Penn Marketplace portal including your contact information, address, and payment information.

Please note: you should only use the above, direct link to the portal after you have created your password and security question.

Once you have been approved by Purchasing Services and your account has been created in the Penn financial system, you can log in to update your information at: https://solutions.sciquest.com/apps/Router/SupplierLogin?CustOrg=UPENN.

When you enter the University Supplier/Payee Portal, you will be prompted to enter your email and password and Login. If you have forgotten your password, click on Trouble logging in? at the bottom of the login page.

There are six 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 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.

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 the registration requirements you will need during the registration process.

- Enter your First and Last Name

Individual Overview
Enter Individual Information:

- Enter your Legal Structure (Individual/Sole Proprietor, Single Member LLC or Foreign Individual).
  - The selection entered in the Legal Structure field will determine what (if any) tax documents will be available during the registration process.
- Enter your Tax ID Type (Individual/Sole Proprietor only).
  - As an individual/payee, please select “Social Security Number” from the drop-down menu.
  - Individual registrations with “Employer Identification Number” selected cannot be accepted.
- Enter your Tax ID Number.
  - Enter your Social Security Number in this space.
  - Enter the number without dashes, spaces, or any other special characters.
- Enter Yes or No for exempt from bank withholding.
- Additional Questions
  - Please enter the name of the individual who provided you the registration link.
  - If applicable, answer Yes or No if you are Penn Student or Employee.
    - If Yes, you will be prompted to enter you PENN ID.
  - Enter the STATE of where services will be completed.

- Click Next >
Addresses

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

- Click **Add Address** to open and add an address.
- **Add Address – Address Details (Step 1 of 2)**
  - In the required field “What would you like to label this address?” enter a title (label) for the address as you would like to refer to it, e.g. “Home” or “Office”.
  - Enter the remaining information - Country, Address Line 1 (Address Lines 2 and 3 are optional), City/Town, State/Province, Postal Code.
  - 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)**.
- It is not required to add a contact if you are the main point of contact for all future inquiries.
- If you would like to enter a contact, first enter a title (label) for the Contact; this label can be whatever you would like to refer to this contact, e.g. “Assistant” or “Self.”
- Enter the remaining contact information (First Name, Last Name, Email, and Phone).
- 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 and proceed to Payment Information.

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 Add Contact.
- 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 Save Changes.
- Click Next.

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/payees, payment terms are Immediate.
- University of Pennsylvania does not offer domestic wire transfers.

- Click Add Payment Information; Select Direct Deposit (ACH); Check, Wire Transfer for international payees only.
- If you would like to be paid by direct deposit, you will need to set up your bank account in the system.
- Select Direct Deposit (ACH).
- Enter **Payment Title**; this title can be however you would like to refer to this payment, e.g. ‘Bank of America checking account’ or “John’s checking”. Enter **Electronic Remittance Email** and **Currency**.

- Enter Bank Account Details:
  - 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**

- **Payment Terms** are set to Immediate upon receipt of invoice.

- If you would like to be paid by check, select “**Check**.”

- Add Payment Information - Payment title and remittance email address.

- Enter **Currency** – **USD**.

- Click **Save Changes**.

- Click **Next**.

**ACH Payment Option**

---

**GREGG, John**

**Payment Information**

Information on this page is used to determine how and where you will receive payment. Please enter an email address if you wish to receive an email notification regarding payments including invoice, date, and amount.

**ACH** – Automated Clearing House, is an electronic network for financial transactions in the U.S. ACH payments are made directly to the supplier bank account set up on the Penn portal.

**Wire** – A method of electronic fund transfer. This method of payment is reserved for Penn’s international suppliers, to their bank account set up on the Penn portal. Special approval must be granted by Purchasing for any domestic U.S wires.

**Check** – Penn’s least favored method of payment. Suppliers are encouraged to change to a more efficient electronic payment method.

Payment Terms are set to Immediate upon receipt of approved invoice.

If you see a yellow warning icon, that means there is information that is required that you have not filled out. Please check your entries to make sure this is not the case. Otherwise you will receive an error message when you try to submit your registration.

**Required Information**

At least one payment type is required to complete this section.

No payment information has been entered.

- **Add Payment Information**
  - Direct Deposit (ACH)
  - Check (Check)
  - Wire Transfer

---

**ACH Payment Option**
Check Payment Option

Tax Information
Here you will be required to upload your tax document (W-9 or W-8). The University of Pennsylvania 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.

- 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.

The University of Pennsylvania recommends that you use the system generated tax document, which will prepopulate the information you provided in your registration into the appropriate fields of the tax document. Below are instructions for using the prepopulated document and electronic signature:

- Click Add Tax Document.
  - Select your document type from the drop-down list – (W-9, W-8BEN, W-8BEN-E).
- Click Download Pre-populated Tax Document.
- Scan, print, sign and save the completed file on your computer; make sure the file is somewhere easy to access, like your desktop.
- Enter Tax Document Name
  - Example: W-9 2018
- Enter Tax Document Year
- Tax Documentation
  - Upload the tax document
  - Click Upload.
  - Enter Title (Example: “W-9” or “W-8”)
  - Click Browse 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
  - Click Add.
- Click Save Changes.
- Click Next.  

![Image of tax document and electronic signature process]

![Add Tax Document dialog box]
If classified as a Foreign individual additional information is required.

- Selecting Sourced outside the US from the drop-down menu requires an upload of the certificate of Foreign Income

**Foreign Tax Information**

The University of Pennsylvania requires additional information from you because you are classified as a Foreign Individual or Non-US based entity. Please fill out all the required information.

Work to be provided *

[Select option]

As a supplier that is sourced outside the US, the University of Pennsylvania requires the following documentation:

- Certificate of Foreign Income Form

[Select file]

**Required to Complete Registration**

As a supplier that is sourced inside the US, the University of Pennsylvania requires the following documentation:

- Photocopy of passport

[Select file]

**Required to Complete Registration**
Certify & Submit

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

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

- Company Overview
  - Tax ID Number

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

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

You will receive an email when you have submitted a completed registration profile. Your registration will be reviewed by Purchasing Services. If any additional information is needed, you will be contacted. Upon Purchasing Services’ approval, you will be available in the University’s database for Penn users to process transactions. If you need additional assistance please contact **SupplierSupport@upenn.edu**.