

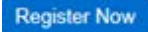


## Supplier/Payee Portal - Individual Registration Guide

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.sciquest.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

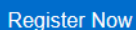


### Individual Invitation for University of Pennsylvania

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.



Thank You,

University of Pennsylvania

If you have any technical questions, please contact Purchasing Services Operations Center at [SupplierSupport@upenn.edu](mailto: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:



**PENN MARKETPLACE**  
Your Procure-to-Pay Portal

[Registration Checklist](#)  
[Registration FAQ](#)  
[Registration Tutorial](#)


### 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



**PENN MARKETPLACE**  
Your Procure-to-Pay Portal

Supplier Registration

[Registration Tutorial](#)

ENGL

Your Contact Info

First Name \*  
John

Last Name \*  
GREGG

Title

Phone Number \*  
International phone numbers must begin with +

ext.

Preferred Time Zone \*  
EDT/EST - Eastern Standard Time (US/Eastern)

Your Login

Email \*  
homickv+gregg@gmail.com

Confirm Email \*

Password \*  
[eye icon]

Re-Enter Password \*  
[eye icon]

Account Recovery Question \*  
Choose your option


CREATE ACCOUNT

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.scquest.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 . 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  button at the bottom of the screen to move from one section to the next.

**GREGG, John**

Registration **In Progress** for:  
*University of Pennsylvania*

**4 of 5** Steps Complete

Welcome	
Individual Overview	✓
Addresses	✓
<a href="#">Contacts</a>	✓
Payment Information	✓
Tax Information	✓
<b>Certify &amp; Submit</b>	

## Welcome

This step provides information related to the registration requirements you will need during the registration process.

- Enter your **First and Last Name**

**JOHN GREGG**

Registration **In Progress** for:  
*University of Pennsylvania*

**1 of 5** Steps Complete

**Welcome**

Individual Overview

Addresses

Contacts

Payment Information

Tax Information

Certify & Submit

Registration FAQ

View History

**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.

**Required to Start Registration**

First Name \*

Last Name \*

JOHN GREGG

★ Required to Complete Registration

Next >

Save Changes

## 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 >

.

**GREGG, John**

Registration **In Progress** for:  
University of Pennsylvania

**1 of 5** Steps Complete

Welcome

- Individual Overview ✓
- Addresses ✓
- Contacts ✓
- Payment Information ✓
- Tax Information ✓
- Certify & Submit

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

### Individual Information

Legal Structure \*

Tax ID Number Type

Tax ID Number \*

Are you exempt from backup withholding? ☐ Yes ☐ No

### Additional Questions

In the question below, please indicate the UPenn employee that provided you this link so that you can onboard as a supplier with the University of Pennsylvania.

Please insert the name of the person at UPenn who provided the registration link to you.

Are you a Penn Student or Employee? \*

☐ Yes ☐ No

State in which services are rendered

★ Required to Complete Registration

< Previous

Next >

Save Changes

## 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 >**.

**GREGG, John**

Registration **In Progress** for:  
University of Pennsylvania

**1 of 5** Steps Complete

Welcome

Individual Overview ✓

**Addresses** ✓

Contacts ✓

Payment Information ✓

Tax Information ✓

Certify & Submit

Registration FAQ | View History

**Addresses** ?

Required Information

At least one address is required to complete this section.

No addresses have been entered

Add Address

Hide Inactive Addresses

◀ Previous

Next ▶

## Add Address

## × Add Address ×

**Address Details** (Step 1 of 2) ?

What would you like to label this address? ★  
  
*Example: Headquarters, Houston Office*

Country ★

Address Line 1 ★

Address Line 2

Address Line 3

City/Town ★

State/Province

Postal Code

Phone ★  
 ext.   
International phone numbers must begin with +

Toll Free Phone  
 ext.   
International phone numbers must begin with +

Fax  
  
International phone numbers must begin with +

**Primary Contact For This Address** (Step 2 of 2) ?

You can also update and add Contacts later from the Contacts page.

☒ Enter New Contact ☐ Not Applicable

Contact Label ★

First Name ★  
 John

Last Name ★  
 GREGG

Position Title

Email ★  
 XXXXXXX@gmail.com

Phone ★  
 +1 215-XXX-0331  ext.   
International phone numbers must begin with +

Toll Free Phone  
 ext.   
International phone numbers must begin with +

Fax  
  
International phone numbers must begin with +

★ Required to Complete Registration 

Next ▶

★ Required to Complete Registration 

◀ Previous

Save Changes

## 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 >**.

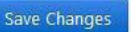

The screenshot shows the 'Add Contact' form overlaid on the 'Contacts' section of the registration profile for John Gregg. The form includes fields for Contact Label (required), First Name (required), Last Name (required), Position Title, Email (required), Phone (required with ext. field), Toll Free Phone (with ext. field), and Fax (with ext. field). A note states 'International phone numbers must begin with +'. The form has 'Save Changes' and 'Close' buttons at the bottom. The background shows the registration progress bar with 'Contacts' marked as complete.

## 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 .
- Click .

**GREGG, John**  
 Registration **In Progress** for:  
*University of Pennsylvania*  
**2 of 5** Steps Complete  
 Welcome  
 Individual Overview ✓  
[Addresses](#) ✓  
 Contacts ✓  
**Payment Information** ✓  
 Tax Information ✓  
 Certify & Submit  
[Registration FAQ](#) | [View History](#)

### 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 pay 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

< Previous

Next >

## ACH Payment Option



## Add Payment Information ×

Payment Title \*

Payment Type \* Direct Deposit (ACH)

Direct Deposit Format

Electronic Remittance Email

Currency \*

Active ☒ Yes ☐ No

### Bank Account

Country \*

Bank Name \*

Account Holder's Name \*

Account Type \*

Address Line 1

Address Line 2

Address Line 3

City/Town

State/Province/Region

Postal Code

\* Required to Complete Registration

Save Changes

Close

### Check Payment Option

## Add Payment Information ×

Payment Title \*

Payment Type \* Check (Check)

Electronic Remittance Email

Currency \*

Active ☒ Yes ☐ No

\* Required to Complete Registration

Save Changes

Close


## Tax Information

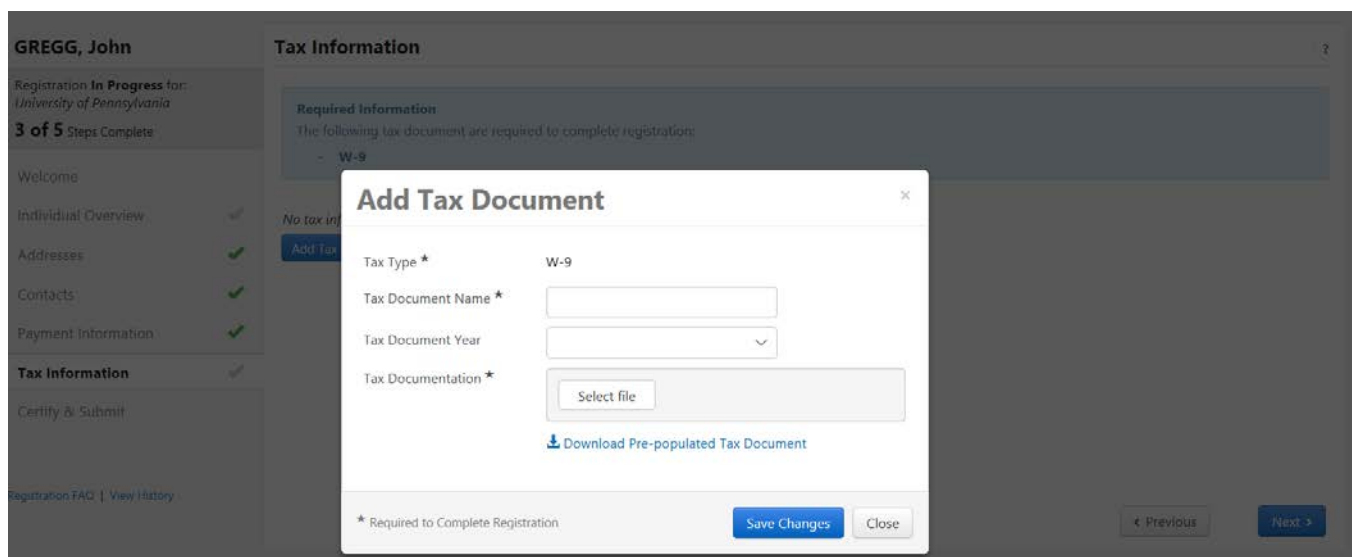
Here you will be required to upload your tax document (W-9 or W-8). The University of Pennsylvania is unable to provide advice on completing tax forms as these forms are governed by the IRS. If you have questions about how

to complete a W-9 or W-8 form, please visit [www.irs.gov](http://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 >** .



The screenshot displays the 'Add Tax Document' modal window over a registration interface for John Gregg. The background interface shows a sidebar with navigation links like 'Welcome', 'Individual Overview', 'Addresses', 'Contacts', 'Payment Information', 'Tax Information', and 'Certify & Submit'. The main content area is titled 'Tax Information' and lists 'Required Information' as 'W-9'. The modal window has the title 'Add Tax Document' and contains the following fields:

- Tax Type \***: A dropdown menu with 'W-9' selected.
- Tax Document Name \***: A text input field.
- Tax Document Year**: A dropdown menu.
- Tax Documentation \***: A section with a 'Select file' button and a link to 'Download Pre-populated Tax Document'.

At the bottom of the modal, there is a note: '\* Required to Complete Registration'. Navigation buttons 'Save Changes', 'Close', 'Previous', and 'Next >' are located at the bottom of the screen.

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 \*

Sourced outside the U.S.

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

- Certificate of Foreign Income Form

Certificate of Foreign Income Form \*

Select file

★ Required to Complete Registration

< Previous

Next >

Save Changes

- Selecting Sourced inside the U.S. from the drop-down menu requires an upload of a photocopy of passport.

**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 \*

Sourced within the U.S.

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

- Photocopy of passport

Photocopy of passport \*

Select file

★ Required to Complete Registration


< Previous

Next >

Save Changes

### 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](#).


**GREGG, John**


Registration **In Progress** for:  
*University of Pennsylvania*


**5 of 5** Steps Complete


Welcome

Individual Overview 

Addresses 

Contacts 

Payment Information 

Tax Information 

**Certify & Submit**

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

**Certify & Submit**

Preparer's Initials

J G

Preparer's Name ★

John GREGG

Preparer's Title

Preparer's Email Address ★

XXXXXXX@gmail.com

Today's Date

3/19/2018

Certification ★

☒ I certify that all information provided is true and accurate.

★ Required to Complete Registration

[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](mailto:SupplierSupport@upenn.edu).