This guide outlines the registration process for Individuals to register as a Supplier

**Overview:**
- Individuals will be invited by Harvard University using the Buy-to-Pay (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 receive the invitation to register email – please check your spam folder.
- The email invitation contains a unique link allowing you to begin the registration process.
- Recommended Browsers are Chrome or Firefox

**Note for International payees (inside & outside the US):**
- If you are required to provide additional tax information, 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, be sure to click the “Certify and Submit” button.
Starting the Registration process:

**The 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
(This section is called “Company” even if an Individual is registering)

US Citizens or permanent residents (including Green Card Holders)
1. Select Legal Structure “Individual/Sole Proprietor”
2. Enter your Tax ID number; either SSN or Employer Identification Number, use the 9-digit format.
3. If you have a HUID, include it.

PLEASE NOTE: Permanent Resident (Green Card Holders) will need to upload a copy of resident card in "Tax Information" section.

Foreign individuals/Non-US payees
1. Select Legal Structure "Foreign Individual"
2. Do not enter a Non-U.S. Tax ID here - If you have a Foreign Tax ID, navigate to the “Tax Information” section and enter it in the Foreign Tax Identification Number field.
3. If you have a HUID, include it.

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)
Address

Provide **two addresses:**
- **Fulfillment** (the tax reporting address)
- **Remittance** (address where a payment is sent)

Please note:
- Foreign individuals must enter a foreign address in Fulfillment address field. [https://nratax.oc.finance.harvard.edu/contact-nra-office](https://nratax.oc.finance.harvard.edu/contact-nra-office)

**Click Add Address**

**Enter Address Details**
- **Select Mail** 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 *)

- 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**

**What would you like to label this address?** *

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
Enter a contact if it was not provided when adding an address. Additional contacts can be added here.
You are required to provide a valid tax document. There are two options on how to submit the tax document.

**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
• 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 and validate the data in form is accurate and complete

- **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.
You are required to provide a valid tax document. There are two options on how to submit the tax document.

**OPTION 2:** If you already have a signed, valid completed tax form, it can be uploaded here.

- **Click Add Tax Document**

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

- **Select File** and upload document

- **Click Save Changes** box to complete the section
Select your payment method.

If selecting Zelle as the payment method, provide a payment distribution email address and select the box to attest to the statement.

Please note: the Payment Distribution Email Address needs to be the email associated with bank account.

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.
If you don’t see this tab, and you have Visa information:
Review and update your Legal Structure on the Company Overview section.

**Required:** Foreign/non-US payees need to select a Visa type.

- If your visa type is “NE| No Entry / No U.S. presence” - You are required to provide a valid tax document in the Tax Information section.

- All other visa types - After completing your B2P registration, you will receive an email from our tax determination system hutax@sprintax.com to provide required U.S. tax information.

- Be sure to click “save changes” and complete registration steps on the next page.

For additional information related to tax compliance, visit: [https://nratax.oc.finance.harvard.edu](https://nratax.oc.finance.harvard.edu)
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

**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: