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Introduction

Welcome to the USC Supplier Portal! The purpose of this guide is to familiarize suppliers with how to use this tool to complete their profiles and keep them up-to-date by maintaining contact and business information.

The guide is organized according to each section in the supplier profile. A couple of important notes before proceeding:

- Throughout this guide, all actions and required fields are shown in red text and all optional fields are shown in green text. In the portal itself, any field marked with an asterisk (*) is required and must be completed.
- All required fields must be completed and each tab must have a green check next to it (see screenshot on page 28) before the profile can be submitted. The green check is applied when all required fields have been completed and the supplier clicks the Next button.

When all of the tabs are completed, a supplier profile is created. The profile data includes the information entered at the time of registration. Suppliers also have the opportunity to include additional information such as alternate addresses and contacts.

Based upon the goods and/or services provided by a supplier, there may be additional questions asked to gather more specific information on a given commodity or service. Some of these commodity-specific questions are required by law (i.e., those providing HIPAA compliant services), or they are designed to help USC determine which suppliers are best qualified to perform a specific service (i.e., construction-related prequalification questions).

If at any time a supplier has forgotten the password, click the Trouble logging in? link on the portal’s login page and follow the prompts to retrieve/reset the password (sent to the registration email address on file in the supplier portal).

To access the Help feature, click the question mark (?) on any section to display the help topics for that section.

For non-technical questions about the information requested, please send an email to supplier@usc.edu or call 213-821-2212.

Like most online applications, the USC Supplier Portal may go through periodic updates. Suppliers who discover any discrepancies between the information contained in this guide and the actual portal experience are requested to send them via email to supplier@usc.edu so that the guide can be updated/corrected.
Step-by-Step Guide

New User Registration

First-time users will receive an email invitation to the USC supplier portal.

- Click on the Register Now button in the email invitation. Suppliers can also access the portal via the USC Supplier Portal link on the USC Business Services website.

Supplier Invitation for USC Supplier Portal

Dear [Name],

USC Supplier Portal has invited you to register as a potential supplier. Our supplier network is a best-in-class Supplier Registration and eProcurement system that provides a one-stop, complete solution for buyer and supplier interaction.

Becoming a USC Supplier Portal network supplier is free, easy and it only takes a few minutes to join. 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 where you can add additional details about your organization, invite colleagues to become users in your site, and more.

[Register Now]

Thank You,

USC Supplier Portal

If you have any technical questions, please contact USC Supplier Data Management Support at supplier@usc.edu or +1 (213) 821-2212 for assistance and identify yourself as registering at the USC Supplier Portal Supplier Network.

- Read the information carefully before clicking on the Continue with Registration button. (Returning users will see this page as well if the USC Supplier Portal URL is bookmarked.)

USC Business Services

Welcome to Supplier Registration

Among other things, this secure system allows our invited business partners, both companies and individuals, access to:

- Maintain an online profile
- Add and update business information, including addresses and contacts
- Enroll in payment programs, such as direct deposit
- Upload insurance and diversity certifications

The registration status of your application can be tracked on the left of the screen. A green checkmark indicates the required fields in a section are complete. You may complete the sections in any order. If any data is incorrect or incomplete, the errors will be listed at the top of the Certify & Submit section.

Once you have successfully submitted your profile, you may update it at any time by clicking on the appropriate section name, making the necessary changes and return to the Certify & Submit screen to resubmit your profile.

Please note that it is the preparer’s responsibility to ensure information is accurate and current. Knowingly providing false information may result in disqualifying you or your company from doing business with the University of Southern California.

For a step-by-step guide on completing your registration, go to the Supplier section of the USC Business Services Supplier website.

Note: For suppliers that are Individuals/Sole Proprietors and operate under their own names, the proper format for entering their Legal Company Name is Lastname, Firstname. As there can be many payees with the same first and last name, please include your middle initial after your first name (i.e., Smith, John J.).

[Continue with Registration]
- Make any necessary changes to the First Name and Last Name fields on the New User Registration screen; enter a Title if desired and a Phone Number and extension.

- Enter a password in the Create Password field and confirm it in the Confirm Password field.

- Select and answer a Question under Security Information and click the Register button.

New User Registration

Contact Information

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td>Kerry</td>
</tr>
<tr>
<td>Last Name</td>
<td>Etheridge</td>
</tr>
<tr>
<td>Title</td>
<td></td>
</tr>
<tr>
<td>Phone Number</td>
<td>ext.</td>
</tr>
</tbody>
</table>

Login Information

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email</td>
<td><a href="mailto:feedback@usc.edu">feedback@usc.edu</a></td>
</tr>
<tr>
<td>Create Password</td>
<td></td>
</tr>
<tr>
<td>Confirm Password</td>
<td></td>
</tr>
</tbody>
</table>

Security Information

Select your Security Question and enter an answer. This information will be used in the future if you forget your password.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Question</td>
<td></td>
</tr>
</tbody>
</table>

* Required to Create Account
Returning Users

- Click on the **Continue with Registration** button on the supplier portal landing page (see image above).

- Enter **password** on the **Secure Account Login** screen and click the **Login** button. To reset password, click the **Trouble logging in?** link and follow the prompts.

![Secure Account Login](image-url)
Welcome to Supplier Registration

- Edit the Legal Company Name if necessary and click the Next button. For suppliers that are individuals or sole proprietors and operate under their own names, the proper format for entering their Legal Company Name is Lastname, Firstname. As there can be many suppliers with the same first and last name, please include your middle initial after your first name (i.e., Smith, John J.).
Company Overview

The **Company Overview** section captures information related to legal structure and taxes. If you selected Individual/Sole Proprietor as your **Legal Structure**, the **Tax ID Type** defaults to SSN; however, you have the option to select **Federal ID**, if that is how you do business.

### Company Overview

Please provide the following tax, legal structure, and business information (as relevant). This information is used to verify the validity of your entity against the IRS Taxpayer Identification Number database. The Legal Name entered on the previous screen must match the Tax ID Number below. The U.S. Tax ID Number must be a numeric value of nine digits.

Country of Origin should reflect the location of your permanent business or residence (for individuals).

Dun & Bradstreet Numbers (DUNS) are relevant to businesses only. For more information please visit the [Dun & Bradstreet website](#).

<table>
<thead>
<tr>
<th>Input Area</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Doing Business As (DBA)</td>
<td></td>
</tr>
<tr>
<td>Country of Origin</td>
<td>United States</td>
</tr>
<tr>
<td>Does your business have a DUNS number? *</td>
<td>Yes/No</td>
</tr>
<tr>
<td>Legal Structure</td>
<td>Individual/Sole Proprietor</td>
</tr>
<tr>
<td><strong>Tax ID Type</strong></td>
<td>SSN</td>
</tr>
<tr>
<td><strong>Tax ID Number</strong></td>
<td>123456789</td>
</tr>
<tr>
<td>Website</td>
<td></td>
</tr>
</tbody>
</table>

**Additional Questions**

Please provide an email address for contact regarding invoice and payment issues: *

kerry.etheridge@usc.edu
Additional Questions:

If the **Country of Origin** is United States, the following tax-related questions appear under **Additional Questions**. For tax-reporting purposes, please indicate your **Income Type, Resident Status**, and whether you are **eligible for nonresident withholding**.

If your entity has no California presence, are you eligible for an exemption from nonresident withholding under California Revenue and Taxation Code (R&TC) Section 186627 **?**

Exemption Form Upload: Only applicable to business outside of California claiming tax exemption (i.e., Form 590).

If your entity has no California presence and you have been pre-approved by the Franchise Tax Board (FTB) for reduced withholding, what percentage of reduction do you claim? **(FTB Approval Letter upload required)**

Franchise Tax Board (FTB) Approval Letter: **No file selected**

* Required to Complete Registration
If the **Country of Origin** is **not** United States, the following tax-related questions appear under **Additional Questions**. For tax-reporting purposes, please indicate your **Resident Status**, **Foreign Taxpayer ID Number**, and **Income Code**.

**Additional Questions**

Please provide an email address for contact regarding invoice and payment issues: *

kerry.etheridge@usc.edu

**Resident Status:**

**Foreign Taxpayer ID Number:** *

**Income Codes:**

11 - Motion picture or television copyright royalties
12 - Other royalties (example, copyright, recording, publishing)
16 - Scholarship or fellowship grant
17 - Compensation for independent personal service
42 - Earnings as an artist or athlete – no central withholding agreement Form 13930
43 - Earnings as an artist or athlete – central holding agreement Form 13930
54 - Other income

**Select Income Code:** *

- [ ] 11
- [ ] 12
- [ ] 16
- [ ] 17
- [ ] 42
- [ ] 43
- [ ] 54

* Required to Complete Registration
Business Details

- To select or change the supplier’s **Primary NAICS Code**, click the **Edit** button to open search screen.

- Search for the Primary NAICS Code by: 1) entering either keywords or six-digit NAICS Code in the **Search By Keyword** field and clicking **Search** (recommended); 2) clicking **List All**, or; 3) expanding the categories until the appropriate code is found. Click on the appropriate code to populate the field, or click on the **X** to close the list.

- Follow the procedure above to select or change the supplier’s **Secondary NAICS Code**.
**Addresses**

**Note:** Before beginning this section it is recommended that you download and print the **Supplier Portal Addresses Worksheet** from the Addresses, Contacts and Locations page (https://businessservices.usc.edu/supplier-portal-addresses/) on the USC Business Services website.

All suppliers are required to have at least one each of the two **Address Types:**

- Other (physical); and
- Receives Payment (remittance).

Click on the **Add Address** button to add an address.

---

**Basic Information:**

- Enter a **label** for the address.
- Select one or more **address type**.
- Click the **Next** button.

**Note:** If the address for both required addresses is the same, you may check both address types on this screen to add both of the required addresses at once.
Address Details:
For all addresses, enter:

- **Country**
- **Address Line 1**
- **Address Line 2**
- **City/Town**
- **State/Province**
- **Postal Code**
- **Phone and extension**
- **Toll Free Phone and extension**
- **Fax**

Click the Next button.

**Note:** U.S. addresses require the five-digit zip code, plus the four-digit extension (ZIP+4). If you do not know your four-digit extension, go to the USPS’s online zip code look-up ([https://tools.usps.com/go/ZipLookupAction!input.action](https://tools.usps.com/go/ZipLookupAction!input.action)).
Primary Contact For This Address:

While not required, contacts can be added when entering an address or in the Contacts section (p. 16).

To skip adding a contact with the address, click the Not Applicable radio button.

To add a contact, enter:

- Contact Label
- First Name
- Last Name
- Position Title
- Email
- Phone and extension
- Toll Free Phone and extension
- Fax

- Click the Save Changes button to close the Add Address window.
When all required addresses have been added, the **Required Information** box no longer shows at the top of the screen.

You can edit and inactivate addresses in several ways:

To edit addresses:
- Click on the **Address Label**; or
- Select **Edit** in the **Edit** drop-down.

```
<table>
<thead>
<tr>
<th>Address Label</th>
<th>Address Types</th>
<th>Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>My Office</td>
<td>Remittance (Primary) Physical (Primary)</td>
<td>3500 South Figueroa Street Suite 210 Los Angeles, CA 90089-8015 US</td>
</tr>
</tbody>
</table>
```

Add Address

Show Inactive Addresses
Step-by-Step Guide
USC Supplier Portal (DV Suppliers)

To deactivate addresses:

- Select **Make Inactive** in the **Edit** drop-down; or
- **Uncheck** the address type on the **Edit Address** screen.

- Click on the **Show/Hide Inactive Addresses** link to display or conceal inactive addresses.
Contacts

Contacts are not required for DV Suppliers; however, should you wish to add one in the Contacts section, click on the Add Contact button.

<table>
<thead>
<tr>
<th>Contact Label</th>
<th>Contact Types</th>
<th>Name</th>
<th>Email</th>
<th>Edit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal Assistant</td>
<td>Other (Primary)</td>
<td>Wilson, Mary</td>
<td><a href="mailto:mewilson@usc.edu">mewilson@usc.edu</a></td>
<td></td>
</tr>
</tbody>
</table>

Show Inactive Contacts
For all contacts, enter:

- Contact Label
- First Name
- Last Name
- Position Title
- Email
- Phone/Ext.
- Toll Free Phone/Ext.
- Fax

Click the **Save Changes** button to close the **Add Contact** window.

**Note:** The Contact Type in the DV Supplier application defaults to **Other**.

You can edit and inactivate contacts in several ways:

To edit contacts:

- Click on the **Contact Label**; or
- Select **Edit** in the **Edit** drop-down.
To deactivate contacts:

- Select **Make Inactive** in the **Edit** drop-down; or
- **Uncheck** the contact type on the **Edit Address** screen.
- Click the **Save Changes** button to close the **Edit Contact** window.

Click on the **Show/Hide Inactive Contacts** link to display or conceal inactive contacts.

To link contacts to addresses:

- Select **Manage Associated Addresses** in the **Edit** drop-down.
• If there are no addresses currently associated with the contact, click the **Edit** button on the **Manage Associated Addresses** screen to view available addresses.

• Select the appropriate address and click the **Done** button to return to the **Manage Associated Addresses** screen.

**Note:** You may only associate one address with a contact; however, you may associate multiple contacts with a single address.

• To remove an **Associated Address**, click the red minus sign next to it.

• To edit an **Associated Address**, click the **Edit** button to open the **Manage Associated Addresses** screen. Follow the steps above for selecting and saving Associated Addresses.

• Click the **Save Changes** button to close the **Manage Associated Addresses** window.
Diversity

To add a diversity classification, answer Yes to the question Does Your Business Qualify as a Diverse Supplier?

Click on the Add Diversity Classification drop-down.

Hover over the Federal Diversity Classifications and State Diversity Classifications and select the applicable option. If your business qualifies as small, start with selecting the Small Business Enterprise (SBE) option and then add a more specific classification. All suppliers that declare the SBE classification must have at least one other classification.
Step-by-Step Guide

- Select Yes to the question Are you SAM listed? if your business is included in the System for Award Management (SAM) database.
- Enter your CAGE code. This is your company’s five-character Commercial and Government Entity (CAGE) code.
- Click the Add Diversity Classification button to return to the Diversity section.

Repeat the steps above to add other diversity classifications. Each classification has its own requirements for completion, so follow the prompts on the Add Diversity screen. For example:

Some classifications (8a, HUBZone, etc.) require proof of SBA certification. Some classifications (minority-, veteran- woman-owned small businesses, etc.) are self-certified.

- Click the Add Diversity Classification button to add each new classification.

Note: After adding diversity classifications, you will see the message below. You can still add diverse classifications, which will be reviewed by USC Supplier Data Management Services.

To edit a diversity classification:
- Click on the Diversity Classification, or
- Select Edit from the Edit drop-down.

To delete a diversity classification, select Delete from the Edit drop-down.
Payment Information

All USC suppliers are required to provide payment information. The options are:

- Direct Deposit (ACH) – preferred
- Check

Since USC can only issue direct deposit to U.S. banks, foreign entities must select the Check option. The use of wire transfers is dictated on a per-transaction basis; therefore, foreign entities may provide banking information for use with wire transfer to save time.

- Click on the Add Payment Information drop-down and select the appropriate payment type.
For direct deposit, enter:

- **Payment Title**
- **Direct Deposit Format** (must be ACH)
- **Remittance Address**
- **Electronic Remittance Email**
- **Currency** (must be USD)

Under **Bank Account**, enter:

- **Country** (must be **United States**)
- **Bank Name**
- **Account Holder’s Name**
- **Account Type**
- **Address Line 1**
- **Address Line 2**
- **City/Town**
- **State/Province**
- **Postal Code**

Click the **Save Changes** button to close the **Add Payment Information** window.
For payment by check, enter:

- **Payment Title**
- **Remittance Address**
- **Electronic Remittance Email**
- **Currency** (must be USD)

Click the **Save Changes** button to close the **Add Payment Information** window.

When there is an active payment type, the **Required Information** box no longer shows at the top of the screen.

**Note:** Payments cannot be made to multiple accounts, so do not have more than one **Active** account.

- Click the **Edit** button to make changes to your payment information.
- Click the Save Changes button to return to the Payment Information section.

**Note:** You may not change existing bank account information. If you need to change accounts, inactivate the current account and create a new active account.
**Tax Information**

All suppliers have the option of downloading a prepopulated tax form based on answers to pertinent questions in the supplier portal. It is not necessary for U.S.-based suppliers to provide a tax document at this time, but the option to upload one is available.

- U.S. suppliers are required to indicate if they are exempt from Foreign Account Tax Compliance Act (FATCA) reporting under **Additional Questions**.

- Foreign entities should upload foreign tax forms before submitting registration.

**Add Tax Document**

- Click on the **Add Tax Document** drop-down and select the appropriate **Tax Type**.

- For all tax types, enter:
  - **Tax Document Name**
  - **Tax Document Year**

- Upload the tax document and click the **Save Changes** button to close the **Add Tax Document** window.
Policy Compliance

Read and respond to the Conflict of Interest and Athletes and Agents policies. If the answer to the Conflict of Interest question is Yes, provide the names and relationships of relatives who are current USC employees.

### Policy Compliance

Please review the compliance information below and provide responses as applicable. In the next section, you will acknowledge these statements and certify that all information included in this profile is true and accurate.

#### Conflict of Interest

Procurements between USC and business entities where a USC employee, that employee’s close relation, or anyone in the employee’s chain of command either (1) receives any compensation for services performed; (2) holds an equity interest (i.e. stocks, options, warrants); or (3) has a management role (director, officer, supervisor, or any other position that has significant decision making authority), are conflicts of interest and must be disclosed.

A “Close Relation” means spouses, domestic partners, and parents, children, and siblings and each of their respective spouses, or domestic partners.

Are any of your “Close Relations” current USC employees? *

- [ ] No
- [ ] Yes

#### Athletes and Agents

Third Parties who hold themselves out as directly or indirectly representing student-athletes for the purpose of marketing their athletic ability or reputation, or who have certification, licensing or registration as a sports or athlete agent, must immediately provide notification of such facts in writing to the Vice President for Athletic Compliance. See Student Policies and Procedures (Athletes and Agents), for detailed information on mandatory reporting requirements.

* Required to Complete Registration

[Previous] [Next >]
Certify & Submit

When all sections have a **green check** next to them—indicating that all required information has been saved—the **Proceed to Certify and Submit** button appears in all sections.

- Click the **Proceed to Certify and Submit** button to go to the Certify & Submit section.

If you access the Certify & Submit section without seeing the **Proceed to Certify and Submit** button, a list of missing items is displayed at the top of the section.

- Return to any tabs that do not have a **green check** and provide the missing information.
- Follow the instructions to review and complete the **required fields**.

- Click the **Submit** button to submit your registration to USC Supplier Data Management Services.

```
Certify & Submit

The certification information below is only applicable to entities using a U.S. Tax Identification Number.

Please provide the required information below acknowledging that you are authorized to certify on behalf of your entity. It is the entity’s responsibility to ensure profile information is current. Inaccurate information may result in payment delays.

By submitting this registration, you certify all information provided is true and accurate. Knowingly providing false information may result in disqualifying you or your company from doing business with USC.

**Certification**

Under Penalties of Perjury I certify that:
1. The payee’s TIN is correct
2. The payee is not subject to backup withholding due to failure to report interest and dividend income
3. The payee is a U.S. person, and
4. The FATCA code entered (if any) indicating that the payee is exempt from FATCA reporting is correct.

The Internal Revenue Service does not require your consent to any provision of this document, other than the certifications required to avoid backup withholding.

Please type your initials in the box below acknowledging that you are the authorized preparer and that all information provided is correct. It is the supplier’s responsibility to ensure profile information is accurate and kept current. Inaccurate information may result in payment delays.

By submitting this registration, you certify all information provided is true and accurate. Knowingly providing false information may result in disqualifying you or your company from doing business with USC.

**Preparer’s Initials**

**Preparer’s Name**

**Preparer’s Email Address**

**Today’s Date**  8/28/2015

**Certification**

I certify that all information provided is true and accurate.

* Required to Complete Registration
```

Submit
Thank You for Registering

The completion screen lists the next steps in the registration process. From this screen, you can:

- Return to your registration profile
- Return to the supplier portal homepage
- Send a request for additional users to have access to your profile

Thank You for Registering

Registration Complete for KerryTest!

Next Steps

- You will receive a confirmation email with information on what to expect next.
- Bookmark this site in your browser so you can easily make updates to your business profile.
- Send new user request to an additional portal user.
- Return to the homepage and check for any other outstanding tasks.
- Return to Registration Profile

User registration request:

You may request access for additional users to manage and/or view various portal activities.

- Complete the required fields (in **bold**).
- Select a specific role from the **Role** drop-down to limit the user’s access to the portal.
- Click the **Send User Request** button.
USC Supplier Portal homepage:

Once you have submitted your registration, future logins will take you directly to the USC Supplier Portal homepage. Features on this page include:

- Supplier message board
- USC contact information for suppliers
- Link to registration profile
- Form for creating invoices and credit memos (special access required)
- Simple and advanced searches for invoices (coming soon)
Glossary of Fields

The following pages provide a screen-by-screen list of all the fields included in the profile and each field’s definition/function.

New User Registration (p. 3):

- **Contact Information:**
  - **First Name:** First name of registered user.
  - **Last Name:** Last name of registered user.
  - **Title:** Job title of registered user.
  - **Phone Number:** Phone number of registered user.
  - **ext:** Extension of phone number entered (if any).
  - **Fax:** Self-explanatory.

- **Login Information:**
  - **Email:** Email address of registered user.
  - **Confirm Email:** Self-explanatory.
  - **Create Password:** Self-explanatory.
  - **Confirm Password:** Self-explanatory.

- **Security Information:**
  - **Question:** Security question to verify registered user and provide password prompt.
  - **Answer:** Self-explanatory.
  - **Confirm Answer:** Self-explanatory.

Welcome (p. 6):

- **Required to Start Registration:**
  - **Legal Company Name:** Supplier’s legal name as listed on W-9 or foreign tax form. If **Individual/Sole Proprietor**, enter last name first (i.e., Smith, John C.).

Company Overview (p. 7):

- **Doing Business As (DBA):** If supplier does business under a name other than legal name.
- **Country of Origin:** Self-explanatory.
- **Does your business have a DUNS number?:** Yes or No.
- **DUN and Bradstreet Number:** Required if answer to previous question is Yes.
- **Legal Structure:** Legal structure as listed on W-9 form (i.e., C Corporation, Individual/Sole Proprietor, etc.).
- **Tax ID Type:** Federal ID or SSN (Social Security Number). Only displays when Individual/Sole Proprietor is selected for Legal Structure.
**Tax ID Number:** Must be a numeric value of nine digits. The **Legal Name** entered by the supplier must match the **Tax ID Number**.

**Website:** URL of supplier’s website (if any).

- **Additional Questions:**
  
  **Please provide an email address for contact regarding invoice and payment issues:** Self-explanatory.

  **Resident Status:** Select U.S. citizen, permanent resident (green card) or nonresident alien.

  The following fields appear if the supplier’s **Country of Origin** is United States.

  **Income Type:** Select the appropriate income type as reported on a 1099. Suppliers selling products should select **Exempt from 1099 Reporting**.

  **If your entity has no California presence, are you eligible for an exemption from nonresident withholding under California Revenue and Taxation Code (R&TC) Section 18662?** Information available on Form 590 instructions.

  **Exemption Form Upload:** If eligible for tax exemption, upload Form 590.

  **If your entity has no California presence, are you eligible for a reduced withholding pre-approved by the Franchise Tax Board?** Select appropriate percentage of reduced withholding, if applicable.

  **Franchise Tax Board (FTB) Approval Letter file upload:** Required for proof of reduced withholding.

  The following fields appear if the supplier’s **Country of Origin** is **not** United States.

  **Foreign Taxpayer ID Number:** Tax identification number for Country of Origin.

  **Select Income Code:** For foreign suppliers only (information on foreign tax form instructions). Required by USC to issue Form 1042-S.

**Business Details (p. 10):**

- **Products and Services:**
  
  **NAICS Codes:** Select the code that best represents supplier’s products and/or services.

  **Secondary NAICS Code:** Displays after **Primary NAICS Code** is selected.

**Addresses (p. 11):**

- **Basic Information (Step 1 of 3):**
  
  **What would you like to label this address?** Each location for a supplier must have a unique name (i.e., Headquarters, Corporate Office, etc.).

  **Which of the Following Business Activities Take Place at this Address?** Select at least one.

- **Address Details (Step 2 of 3):**
  
  **Country:** Self-explanatory.

  **Address Line 1:** Self-explanatory.

  **Address Line 2:** Self-explanatory.
City/Town: Self-explanatory.
State/Province: Self-explanatory.
Postal code: Self-explanatory. United States requires standard ZIP+4 format.
Phone/ext.: Self-explanatory.
Toll Free Phone/ext.: Self-explanatory.
Fax: Self-explanatory. May or may not be the same as fax number for receipt of purchase orders.

- Primary Contact for This Address (Step 3 of 3):
  Select additional contact type(s) to apply: Self-explanatory.
  Contact Label: Self-explanatory.
  First Name: Self-explanatory.
  Last Name: Self-explanatory.
  Position Title: Self-explanatory.
  Email: Self-explanatory.
  Phone/ext.: Self-explanatory.
  Toll free Phone/ext.: Self-explanatory.
  Fax: Self-explanatory.

Contacts (p. 16):
To open the Add Contact screen, click the Add Contact button.

- Add Contact (not required):
  Contact Label: Self-explanatory.
  First Name: Self-explanatory.
  Last Name: Self-explanatory.
  Position Title: Self-explanatory.
  Email: Self-explanatory.
  Phone/ext.: Self-explanatory.
  Toll free Phone/ext.: Self-explanatory.
  Fax: Self-explanatory.

Diversity (p. 20):
Does Your Business Qualify as a Diverse Supplier?: Select No/Non-US Based or Decline to Answer to bypass this screen; select Yes to reveal Add Diversity Classification drop-down.

- Add Diversity (SBE):
  Are you SBA SAM listed?: Self-explanatory.
  What is your CAGE code?: Only displays when Yes is selected in field above.
• Add Diversity (SBA-certified):
  
  **Are you certified as such by the SBA?:** Self-explanatory.
  
  **Expiration Date:** Only displays when Yes is selected in field above.
  
  **Certification Number:** SBA certification number.
  
  **Upload Certificate:** Browse to and upload SBA certificate (PDF) on computer.

**Payment Information (p. 22):**

• Add Payment Information (Direct Deposit):
  
  **Payment Title:** Self-explanatory (i.e., Invoices)
  
  **Payment Type:** Selected from Add Payment Information drop-down.
  
  **Direct Deposit Format:** Only select ACH.
  
  **Remittance Address:** Select from available remittance addresses.
  
  **Electronic Remittance Email:** For payment-related correspondence.
  
  **Currency:** Must be USD.
  
  **Active:** Self-explanatory. Only one active Payment Information record allowed.

**Bank Account:**

  **Country:** Must be United States.
  
  **Bank Name:** Self-explanatory.
  
  **Account Holder’s Name:** Name of individual with signing authority on account.
  
  **Account Type:** Drop-down menu (Checking or Savings).
  
  **Routing Number:** Also known as an ABA number. May be printed on checks or supplier may need to obtain it from the bank.
  
  **Account Number:** Self-explanatory.
  
  **Confirm Account Number:** Self-explanatory.
  
  **Address Line 1:** Self-explanatory.
  
  **Address Line 2:** Self-explanatory.
  
  **Address Line 3:** Self-explanatory.
  
  **City/Town:** Self-explanatory.
  
  **State/Province:** Self-explanatory.
  
  **Postal code:** Self-explanatory. United States requires standard ZIP+4 format.

• Add Payment Information (Check):
  
  **Payment Title:** Self-explanatory (i.e., Invoices)
  
  **Payment Type:** Selected from Add Payment Information drop-down.
  
  **Remittance Address:** Select from available remittance addresses.
  
  **Electronic Remittance Email:** For payment-related correspondence.
Currency: Must be USD.

Active: Self-explanatory. Only one active Payment Information record allowed.

Tax Information (p. 26):

- Add Tax Document (not required):
  - Tax Type: Selected from Add Tax Document drop-down.
  - Tax Document Name: Self-explanatory (i.e., 2013 W-9).
  - Tax Document Year: Select from drop-down.
  - Tax Documentation Upload: Browse to and upload tax document (PDF) on computer.

- Additional Questions (U.S.):
  - Select FATCA Exemption Code: Indicates reason for exemption from FATCA reporting.

Policy Compliance (p. 27):

Are any of your “Close Relations” current USC employees?: Self-explanatory, based on Conflict of Interest statement.

Please identify all of your “Close Relations” who are current USC employees: Only displays when Yes is selected in field above.

Please the Relationship below: Only displays when Yes is selected in field above.

Certify & Submit (p. 28):

Preparer’s Initials: Self-explanatory.

Preparer’s Name: Self-explanatory.

Preparer’s Email Address: Self-explanatory.

Certification: Box must be checked every time profile is updated.