USC Supplier Portal PO Suppliers Guide

Table of Contents

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:

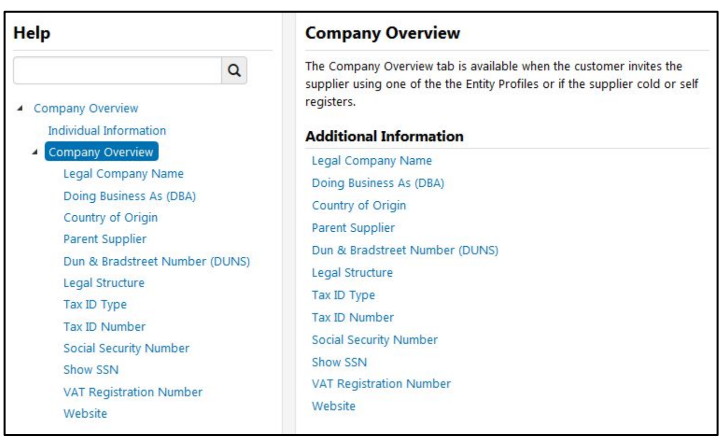
- Throughout this guide, all actions and required fields are shown in **red** text and all optional fields are shown in **green** text. In the portal itself, any field marked with an asterisk (*) is required and must be completed.
- All required fields must be completed and each tab must have a **green check** next to it (see screenshot on page 35) 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).

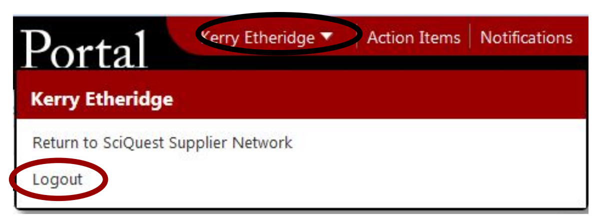
If at any time a supplier has forgotten the password, click the **Trouble logging in?** link on the portal's login page and follow the prompts to retrieve/reset the password (sent to the registration email address on file in the supplier portal).

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



To log out of the portal from any section, click on your **user name** in the banner, and click the **Logout** link.

Note: Clicking the **Return to SciQuest Supplier Network** link will take you out of the USC Supplier Portal (not recommended).



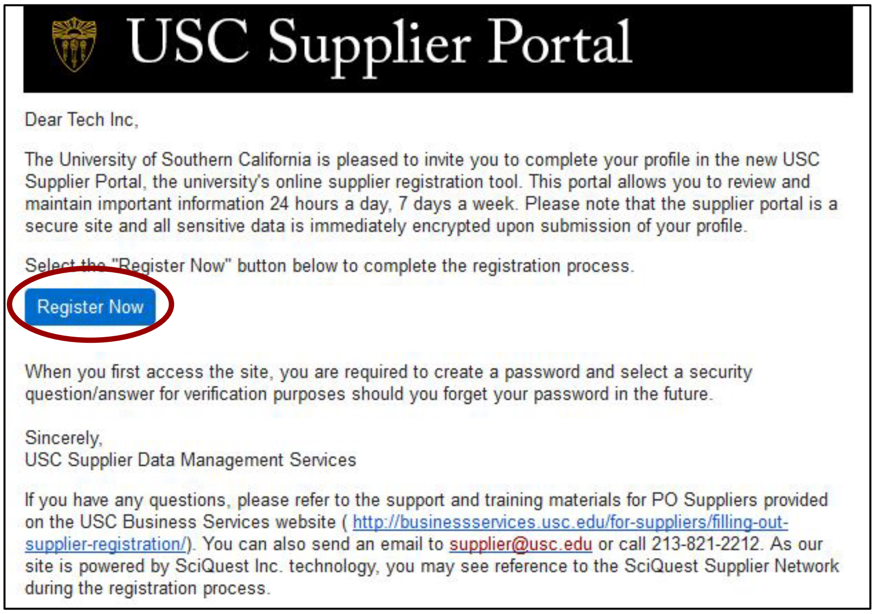
For non-technical questions about the information requested, please send an email to supplier@usc.edu or call 213-821-2212.

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.

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.



USC Supplier Portal

Dear Tech Inc,

The University of Southern California is pleased to invite you to complete your profile in the new USC Supplier Portal, the university's online supplier registration tool. This portal allows you to review and maintain important information 24 hours a day, 7 days a week. Please note that the supplier portal is a secure site and all sensitive data is immediately encrypted upon submission of your profile.

Select the "Register Now" button below to complete the registration process.

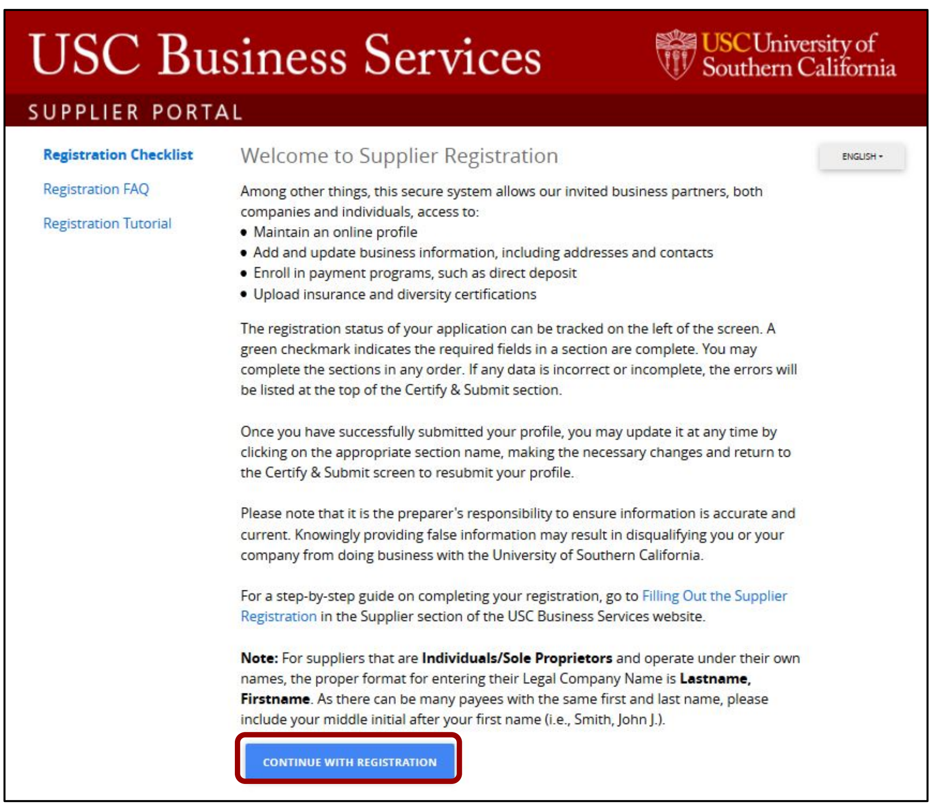
Register Now

When you first access the site, you are required to create a password and select a security question/answer for verification purposes should you forget your password in the future.

Sincerely,
USC Supplier Data Management Services

If you have any questions, please refer to the support and training materials for PO Suppliers provided on the USC Business Services website (http://businessservices.usc.edu/for-suppliers/filling-out-supplier-registration/). You can also send an email to supplier@usc.edu or call 213-821-2212. As our site is powered by SciQuest Inc. technology, you may see reference to the SciQuest Supplier Network during the registration process.

- 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 USC University of Southern California

SUPPLIER PORTAL

Registration Checklist
Registration FAQ
Registration Tutorial

Welcome to Supplier Registration ENGLISH

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.

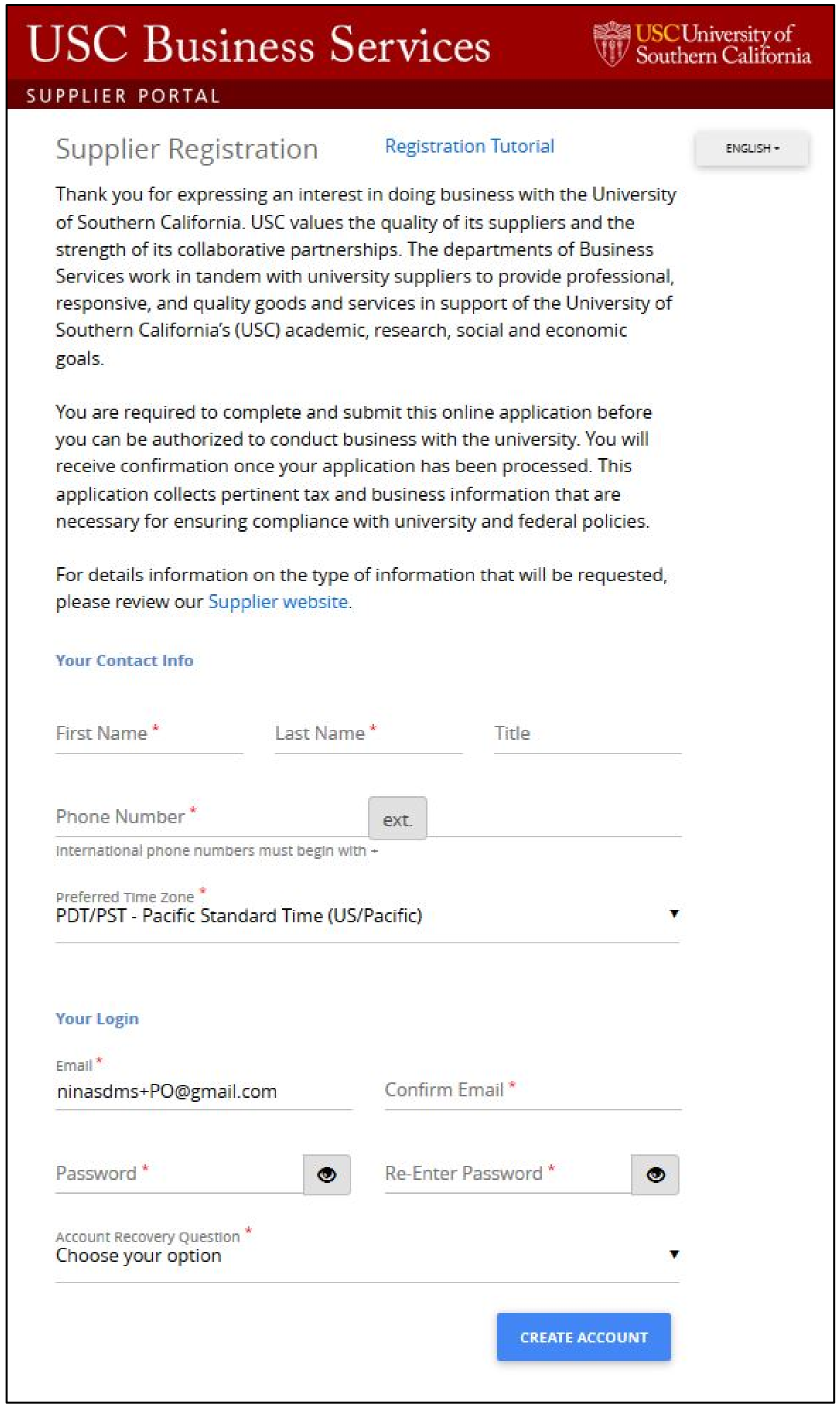
Please note that it is the preparer's responsibility to ensure information is accurate and current. Knowingly providing false information may result in disqualifying you or your company from doing business with the University of Southern California.

For a step-by-step guide on completing your registration, go to Filling Out the Supplier Registration in the Supplier section of the USC Business Services 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

- Enter a **First Name**, a **Last Name** and a **Title** if desired.
- Enter a **Phone Number** and **extension**.
- Select the appropriate **Preferred Time Zone**.
- Enter and confirm an **Email**.
- Enter and confirm a **Password**.
- Select and answer an **Account Recovery Question**.
- Click the **Register** button.



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.

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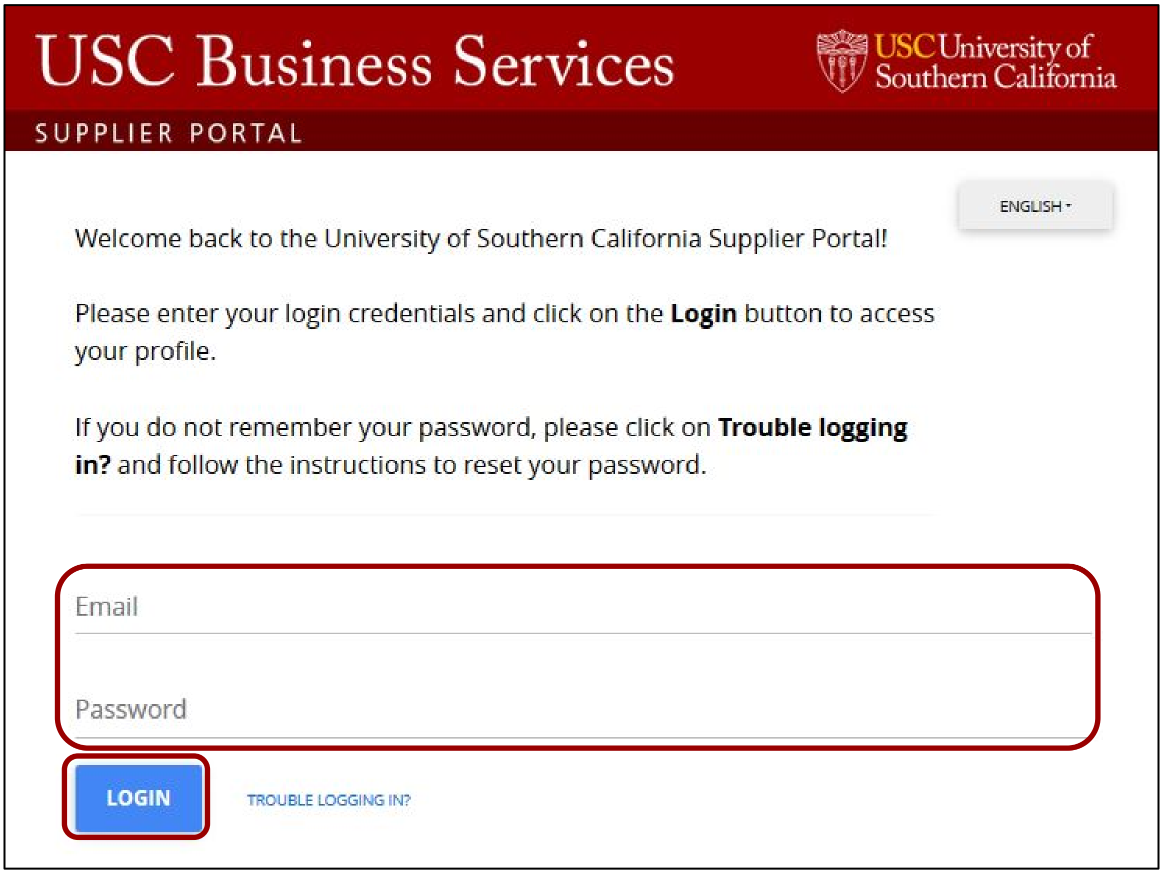
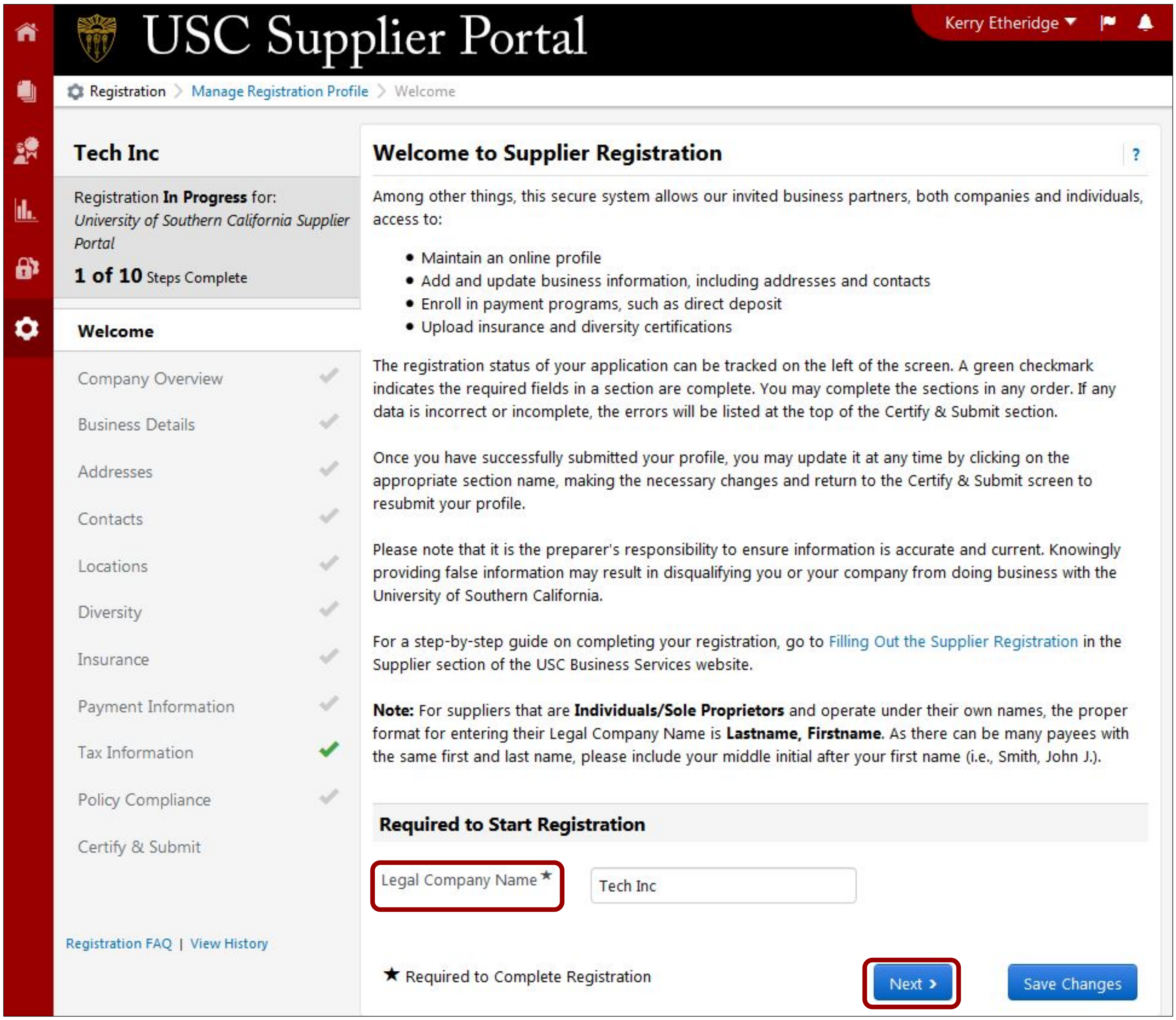


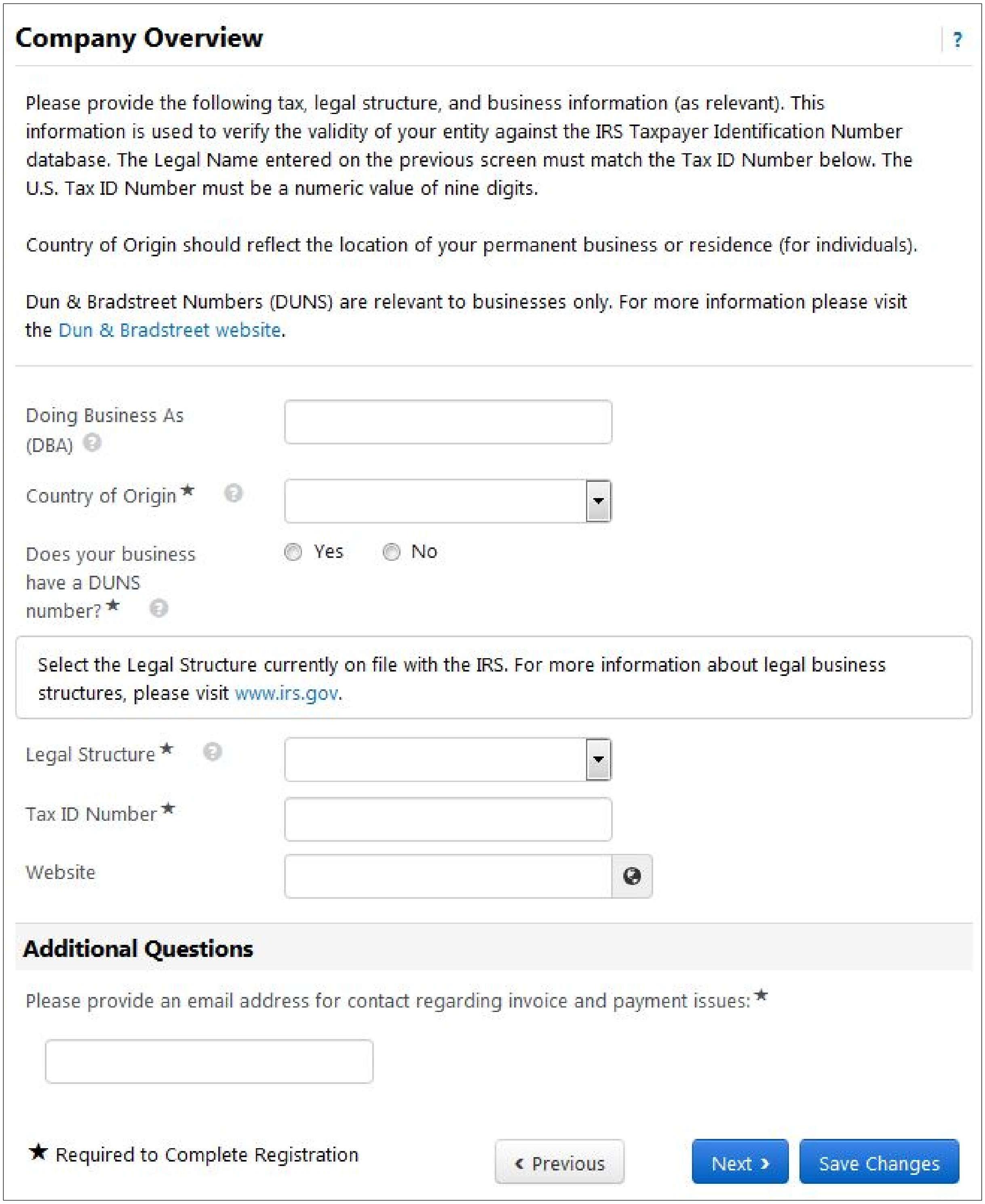
Welcome to Supplier Registration

- 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.



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.

Doing Business As (DBA)

Country of Origin★

Does your business have a DUNS number?★ Yes No

Select the Legal Structure currently on file with the IRS. For more information about legal business structures, please visit www.irs.gov.

Legal Structure★

Tax ID Number★

Website

Additional Questions

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

★ Required to Complete Registration

‹ Previous Next › Save Changes

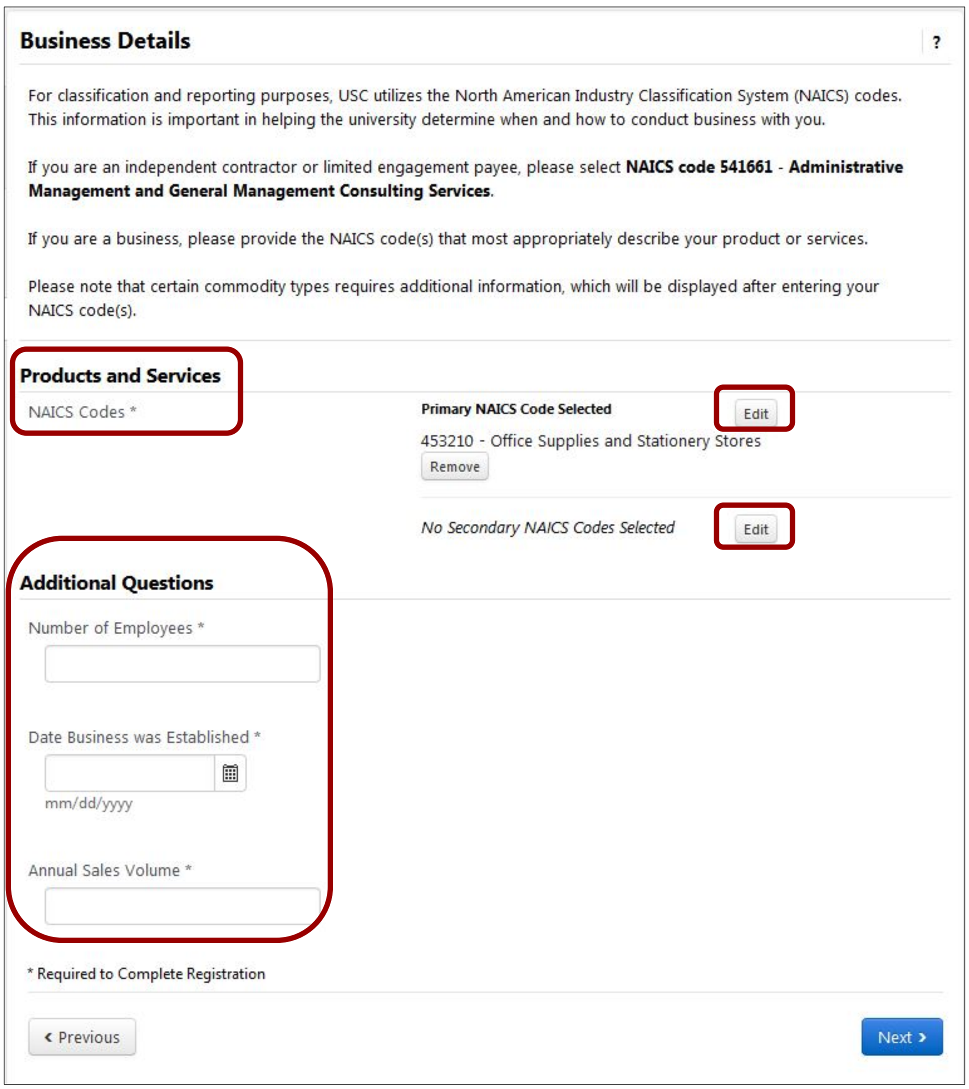
Business Details

- To select or change the **Primary NAICS Code**, click **Edit** 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**.

Depending upon the supplier's **Legal Structure** and/or **Primary NAICS Code**, additional questions will appear at the bottom of the screen.

Additional Questions:

- Enter **Number of Employees**, **Date Business was Established** and **Annual Sales Volume** in the required formats.



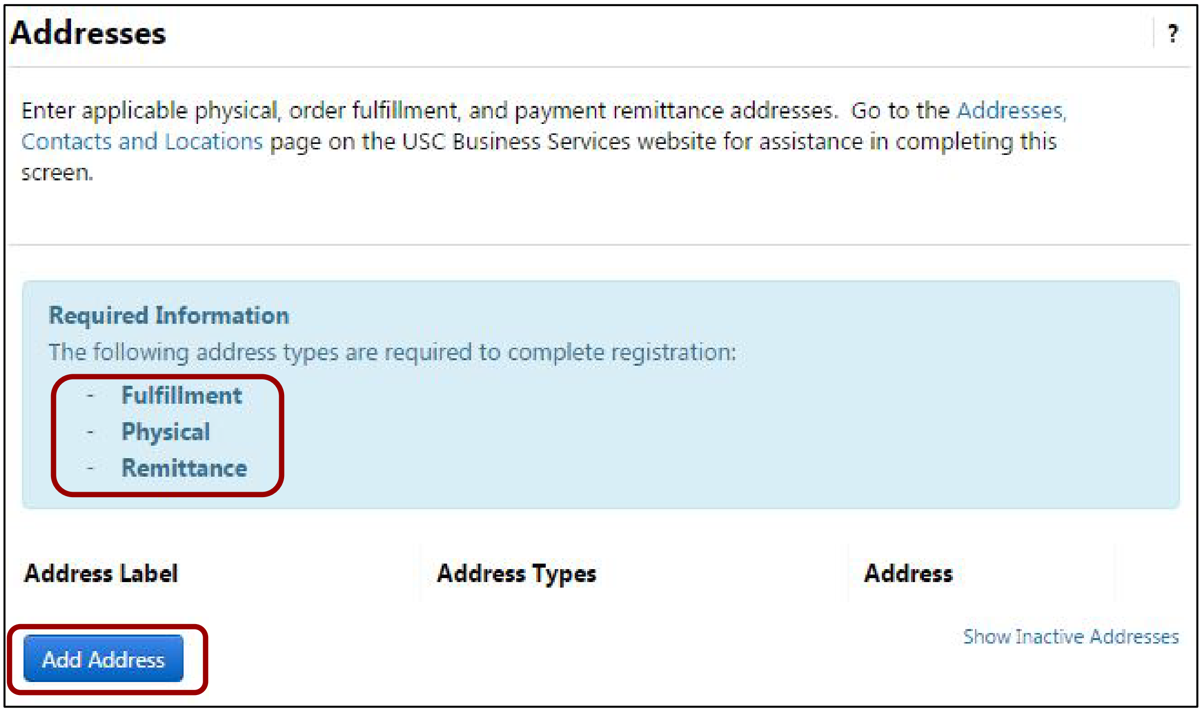
Addresses

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 three **Address Types**:

- Take Orders (fulfillment);
- Receives Payment (remittance); and
- Other (physical).

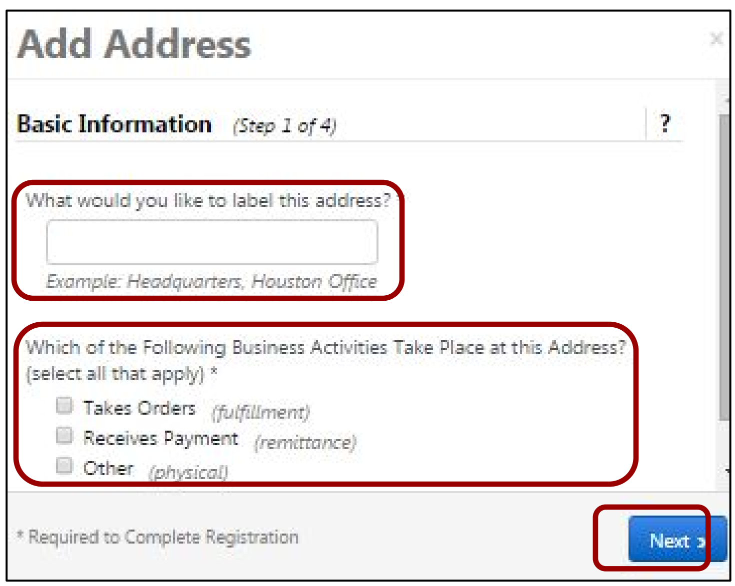
Click on the **Add Address** button to add an address.



Basic Information:

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

Note: If the address for all three required addresses is the same, you may check all of the address types on this screen to add all of the required addresses at once.



Address Details:

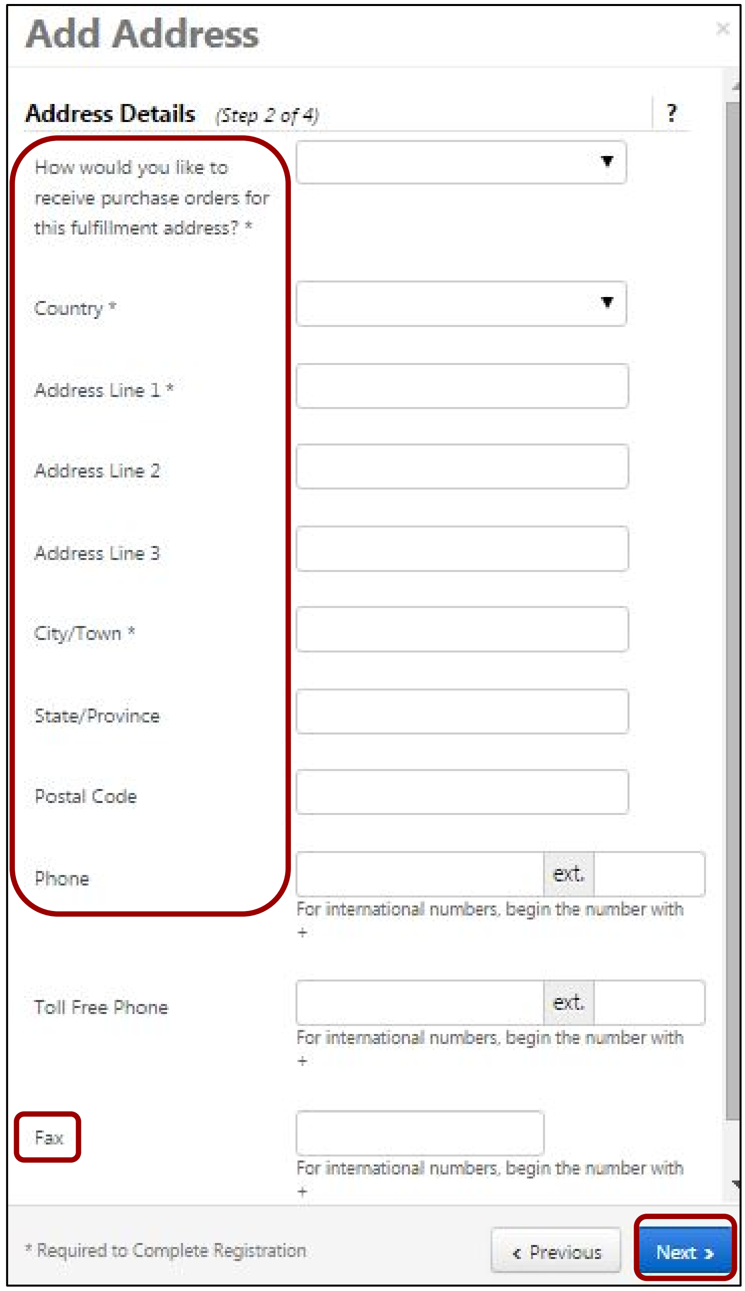
For fulfillment addresses:

- Select a **purchase order receiving method** from the drop-down list.
- Add and confirm an **email address** (for email option).
- Add a **fax number** (for fax option).

For all addresses, enter:

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

Primary Contact For This Address:

Contacts can be added when entering an address or in the **Contacts** section (p. 17).

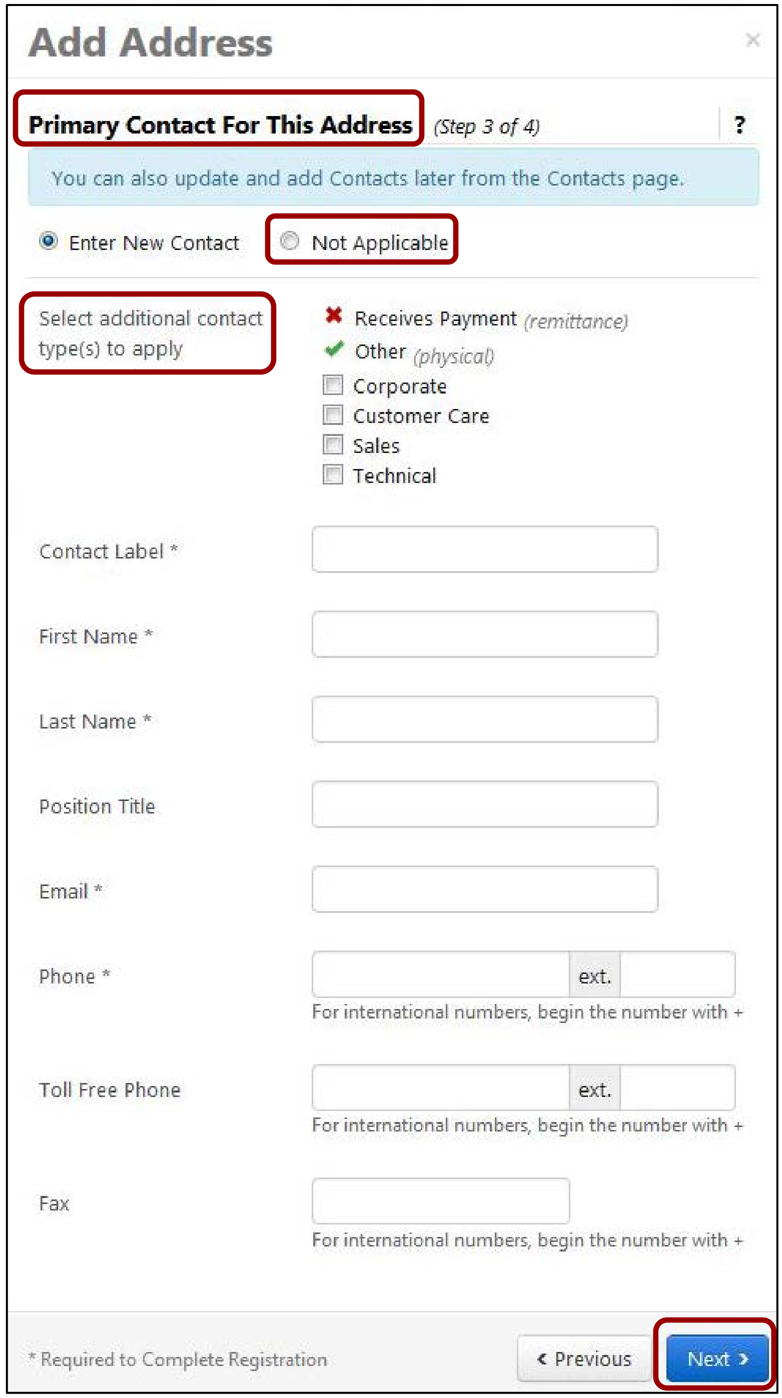
To skip adding a contact with the address, click the **Not Applicable** radio button. Click the **Next** button to move to the final **Add Address** screen.

When adding a new contact to an address, the portal preselects or eliminates possible contact types. These are indicated by either a green check mark (✓) or a red **X**. At least one **contact type** is required before proceeding.

For all contacts, enter:

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

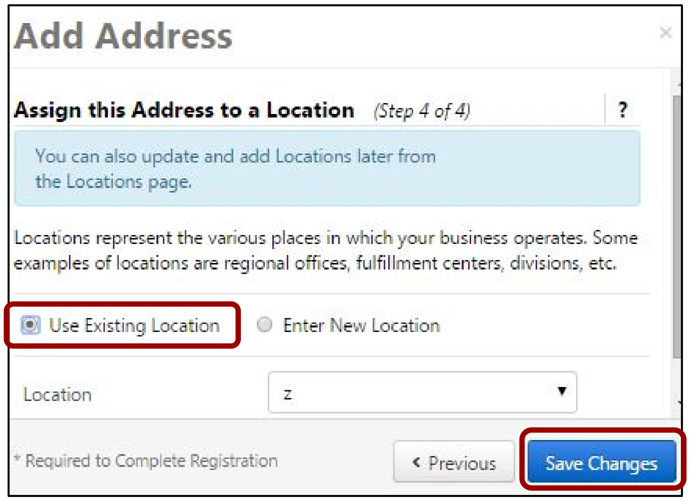
Click the **Next** button.



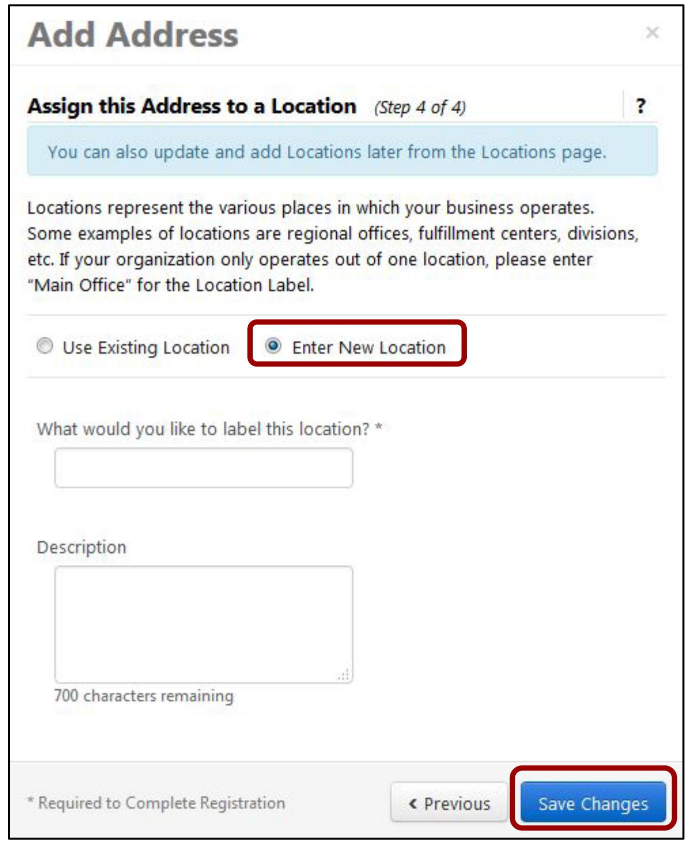
Assign this Address to a Location:

You can assign an existing location or create a new one. Locations can also be added and updated in the **Locations** section (p. 22).

- **Use Existing Location:** Select a **location** from the drop-down menu.

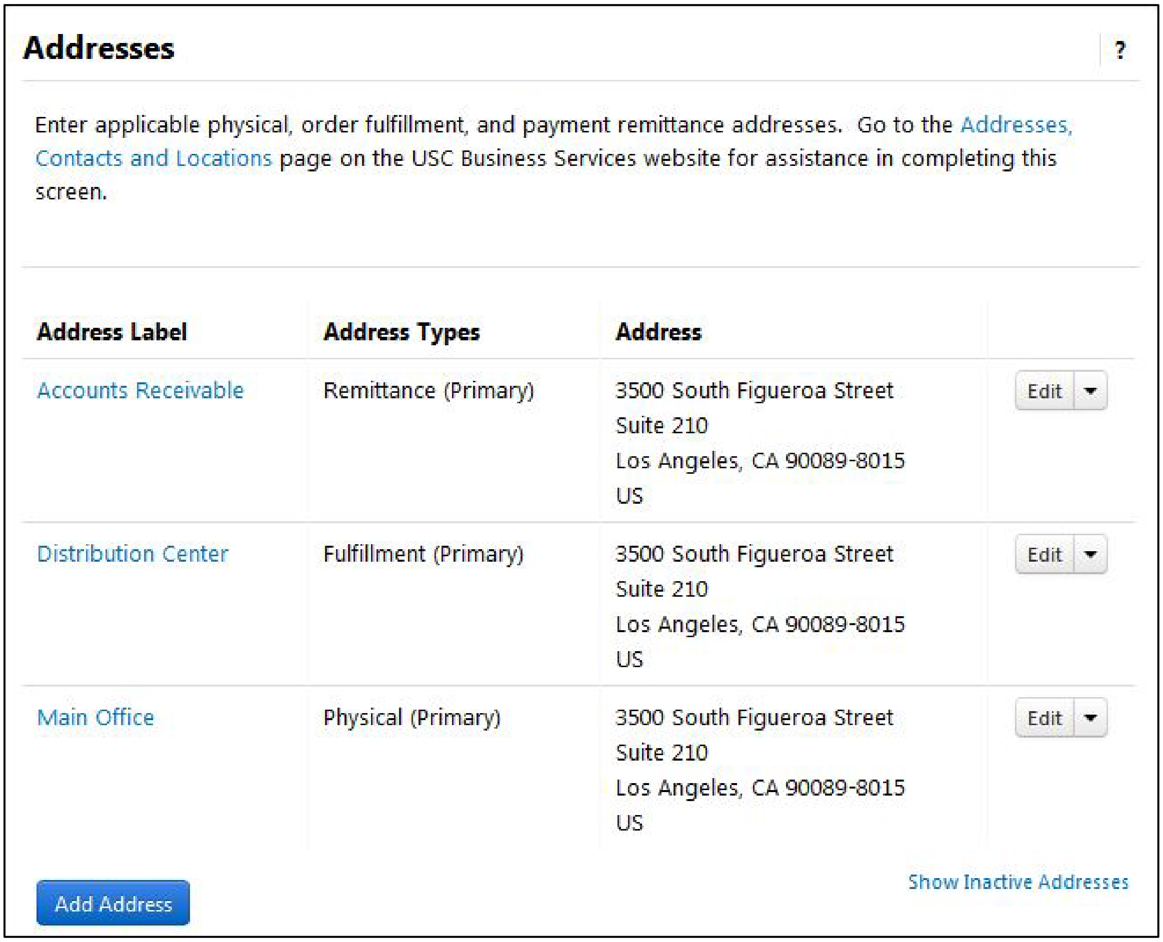


- **Enter New Location:** Enter a **label** and **description**.



- Click the **Save Changes** button to close the **Add Address** window.

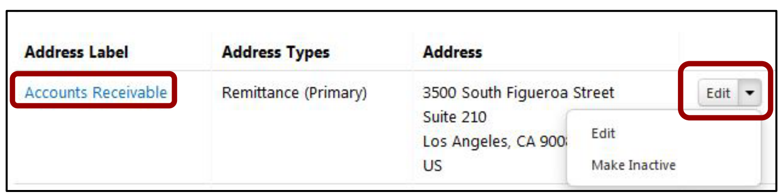
When all required addresses have been added, the **Required Information** box no longer shows at the top of the screen.



You can edit and inactivate addresses in several ways:

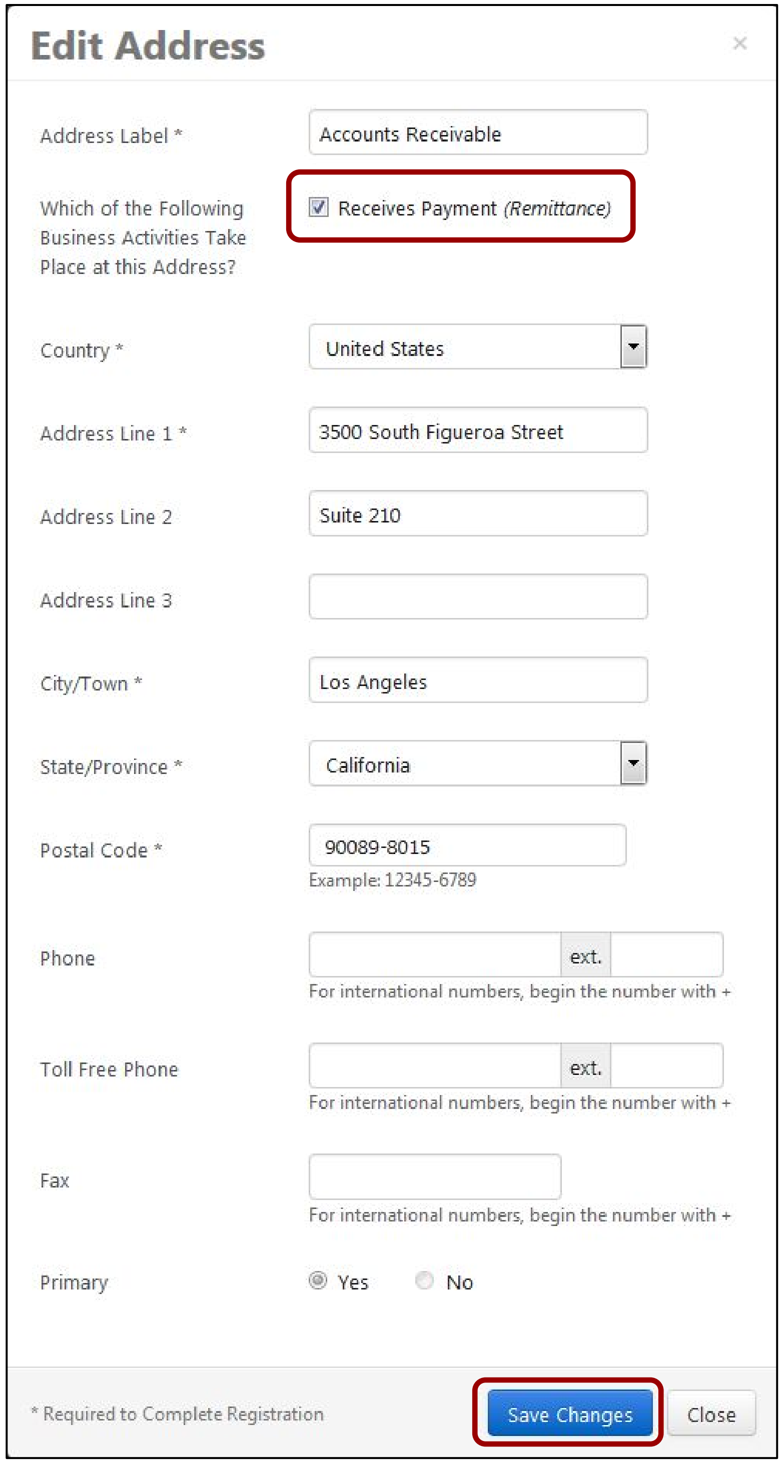
To edit addresses:

- Click on the **Address Label**; or
- Select **Edit** in the **Edit** drop-down.

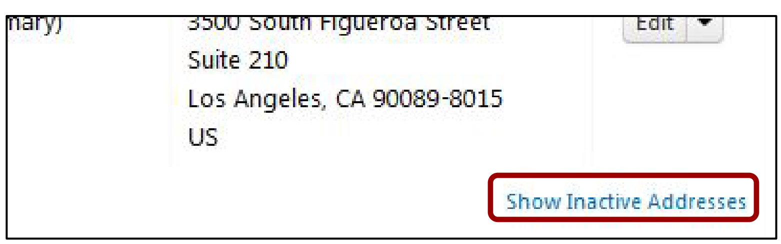


To inactivate addresses:

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



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

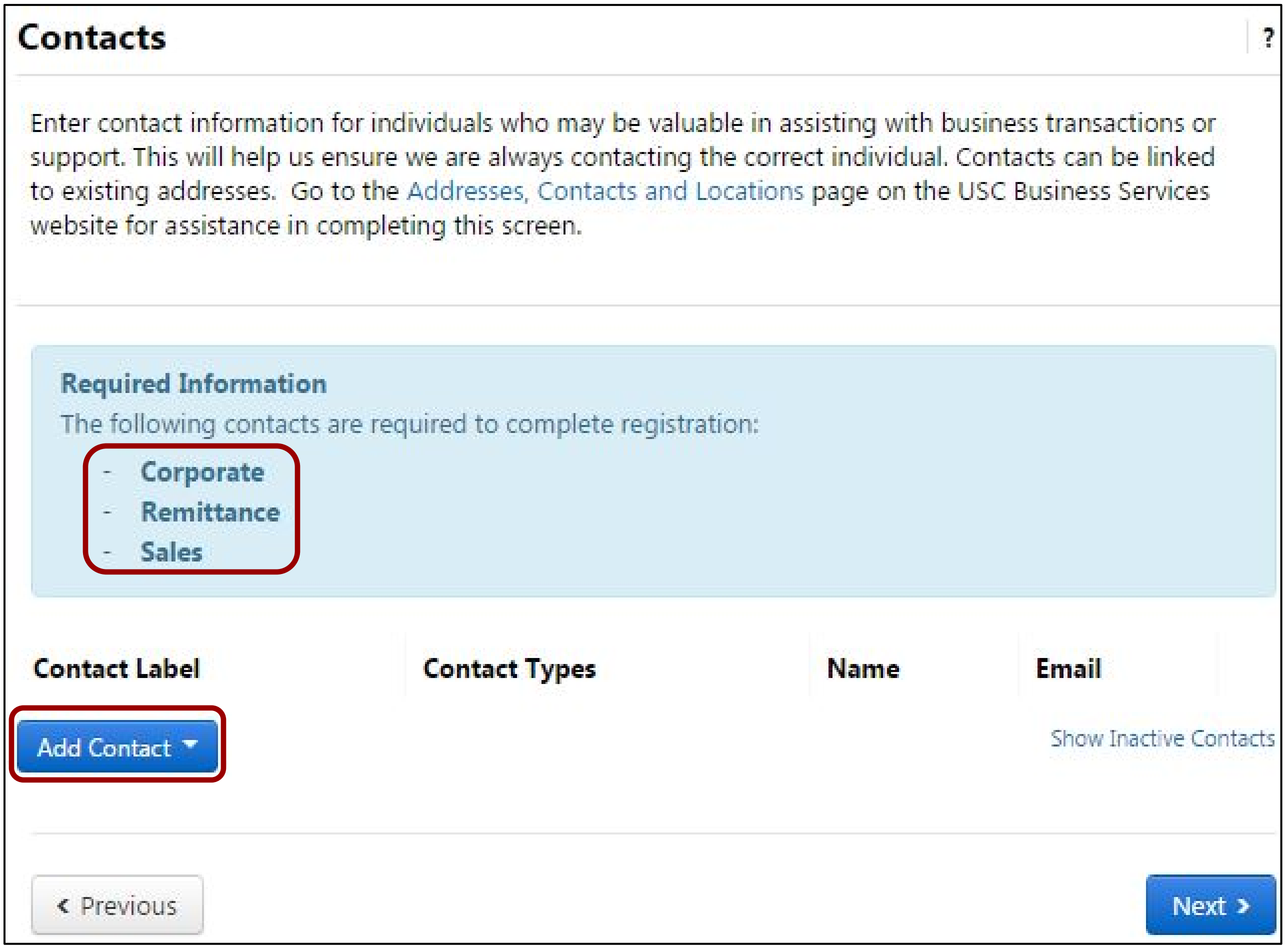


Contacts

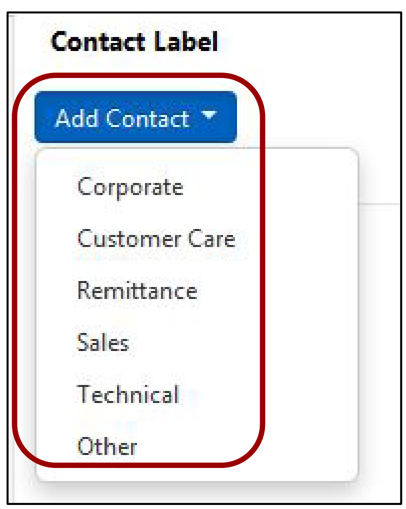
All suppliers are required to have at least one each of the three **Contact Types**:

- Take Orders (fulfillment);
- Receives Payment (remittance); and
- Other (physical).

Click on the **Add Contact** button to add a contact.



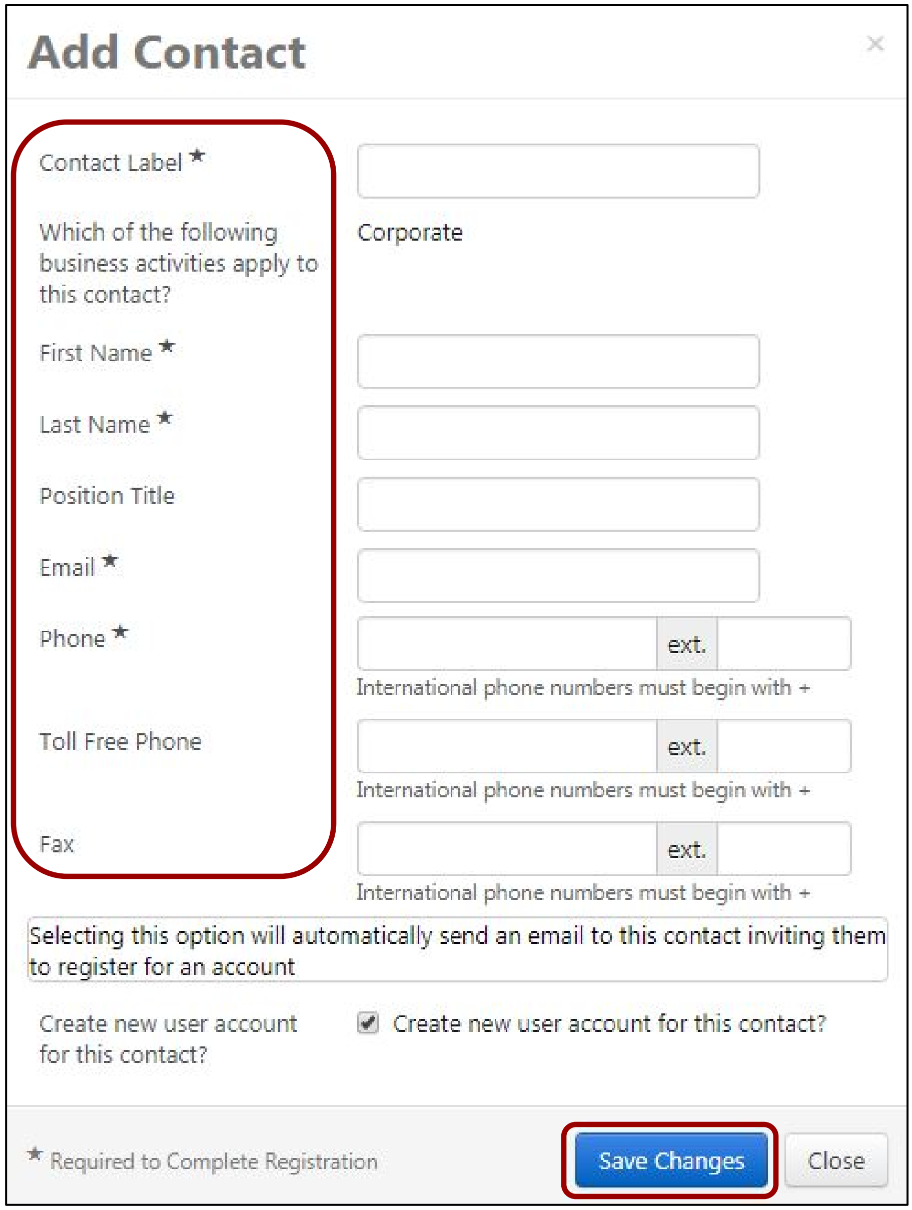
- Select one of the **Contact Types** to open the **Add Contact** screen.



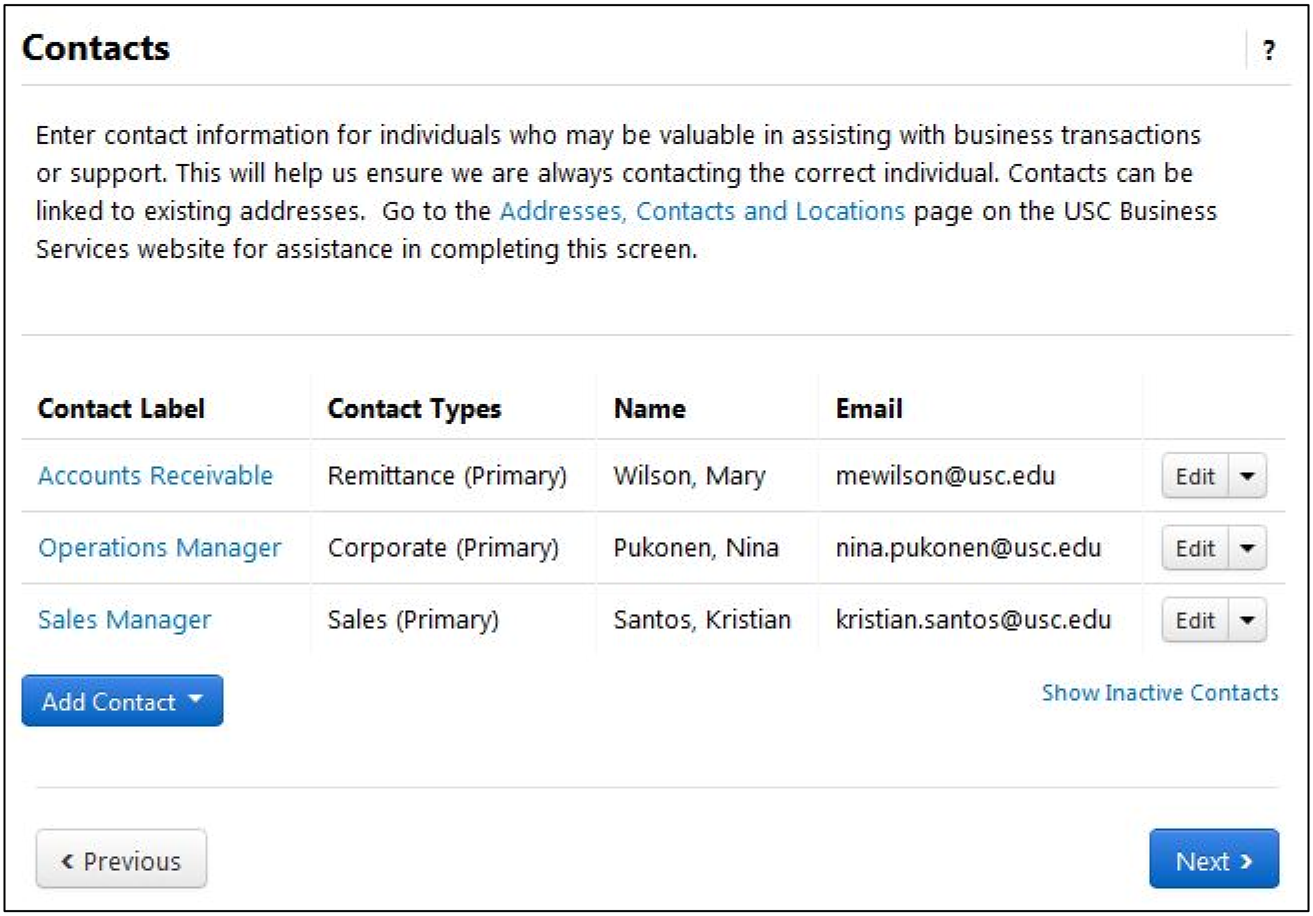
For all contacts, enter:

- **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.

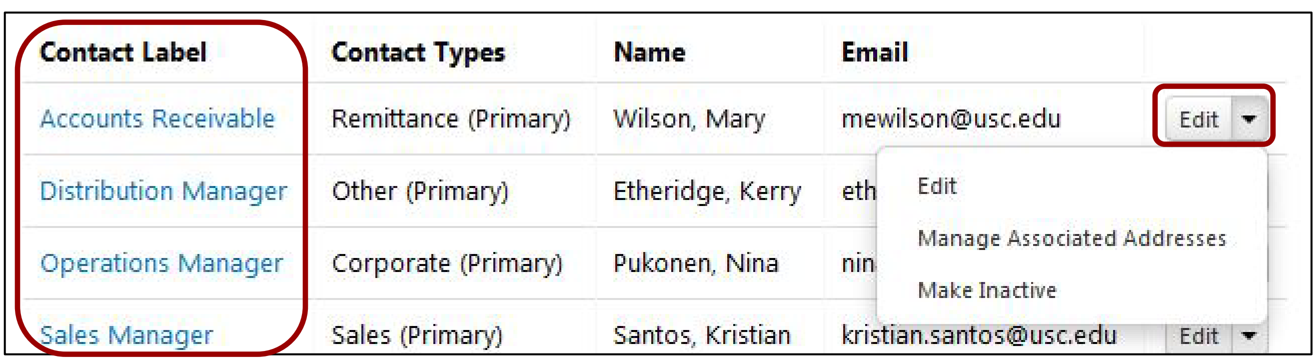


When all required contacts have been added, the **Required Information** box no longer shows at the top of the screen.



You can edit and inactivate contacts in several ways. To edit contacts:

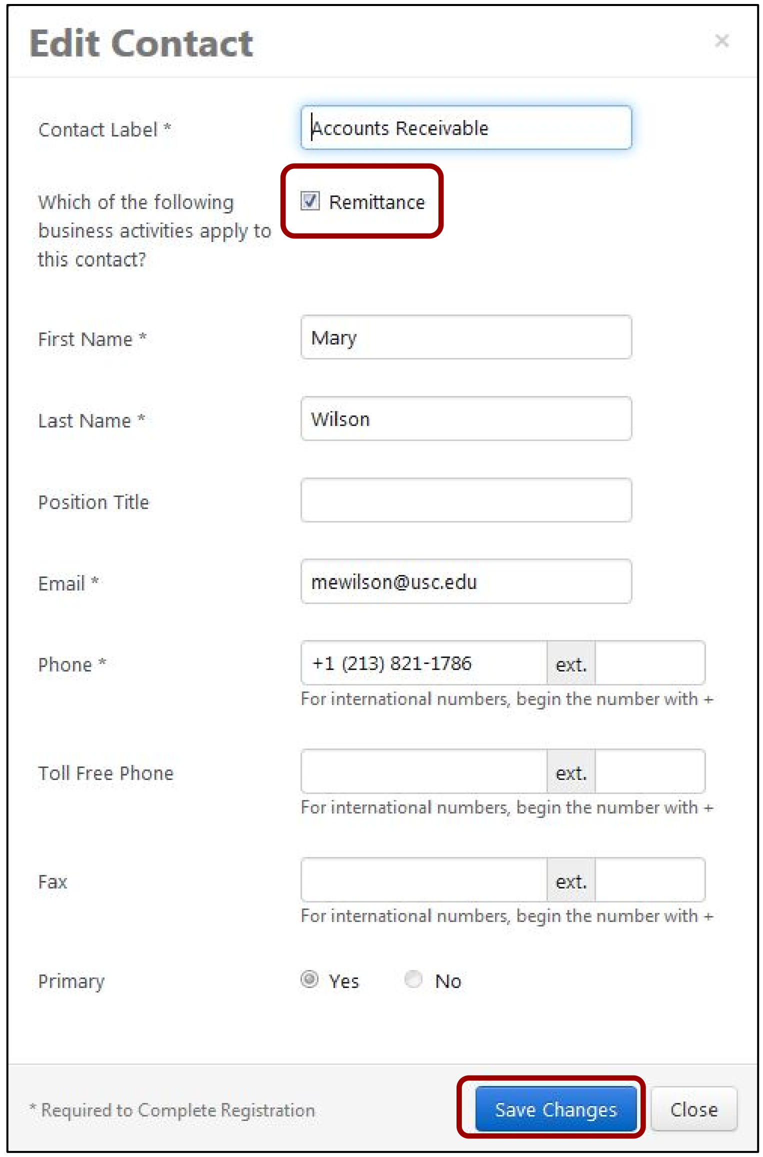
- Click on the **Contact Label**; or
- Select **Edit** in the **Edit** drop-down.



To inactivate contacts:

- Select **Make Inactive** in the **Edit** drop-down (see above); or
- **Uncheck** the contact type on the **Edit Address** screen.

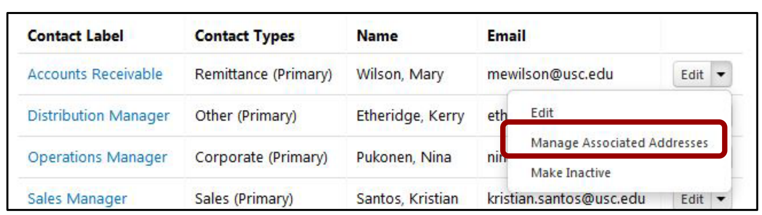
Click the **Save Changes** button to close the **Edit Contact** window.



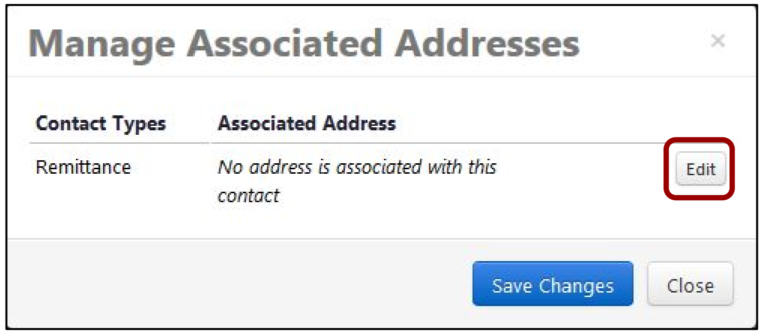
Click on the **Show/Hide Inactive Contacts** link to display or conceal inactive contacts.

To link contacts to addresses:

- Select **Manage Associated Addresses** in the **Edit** drop-down.

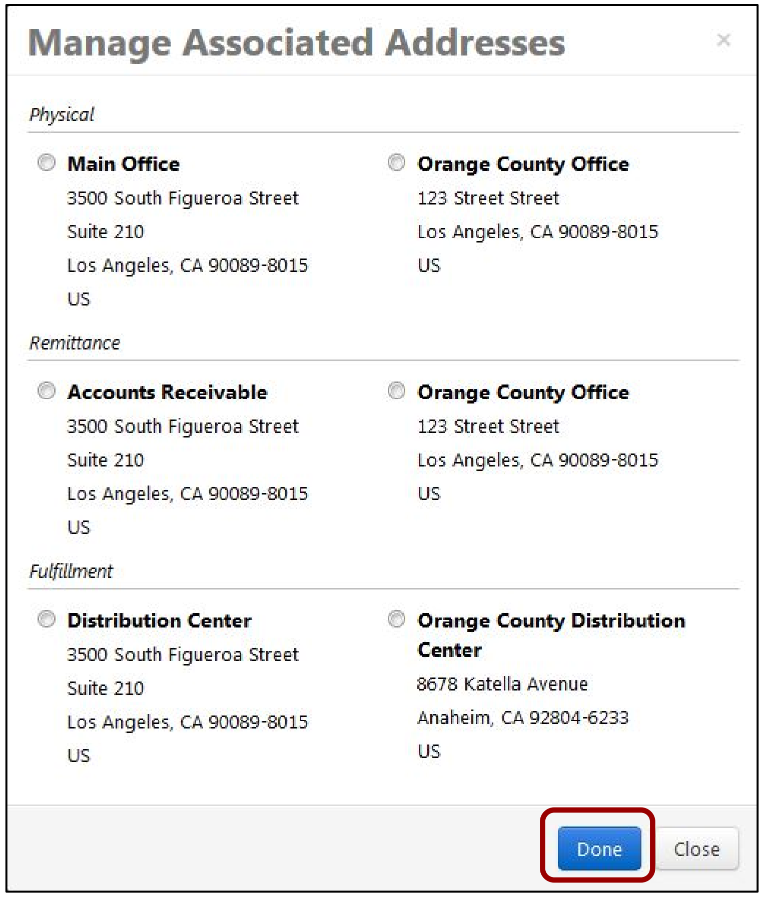


- If there are no addresses currently associated with the contact, click the **Edit** button on the **Manage Associated Addresses** screen to view available addresses.



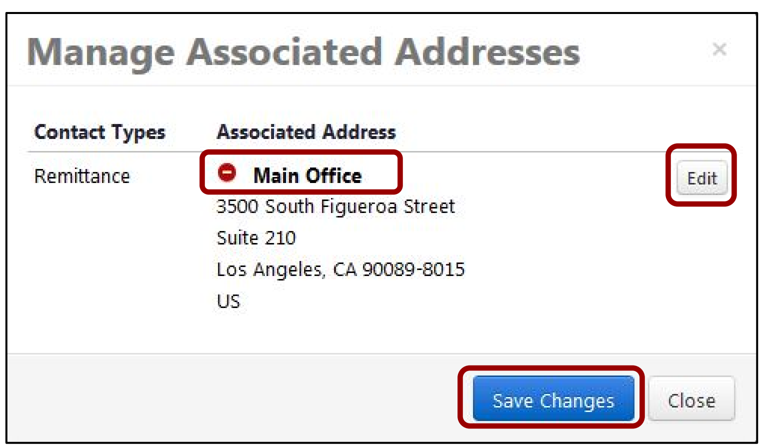
- Select the appropriate address and click the **Done** button to return to the **Manage Associated Addresses** screen.

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.

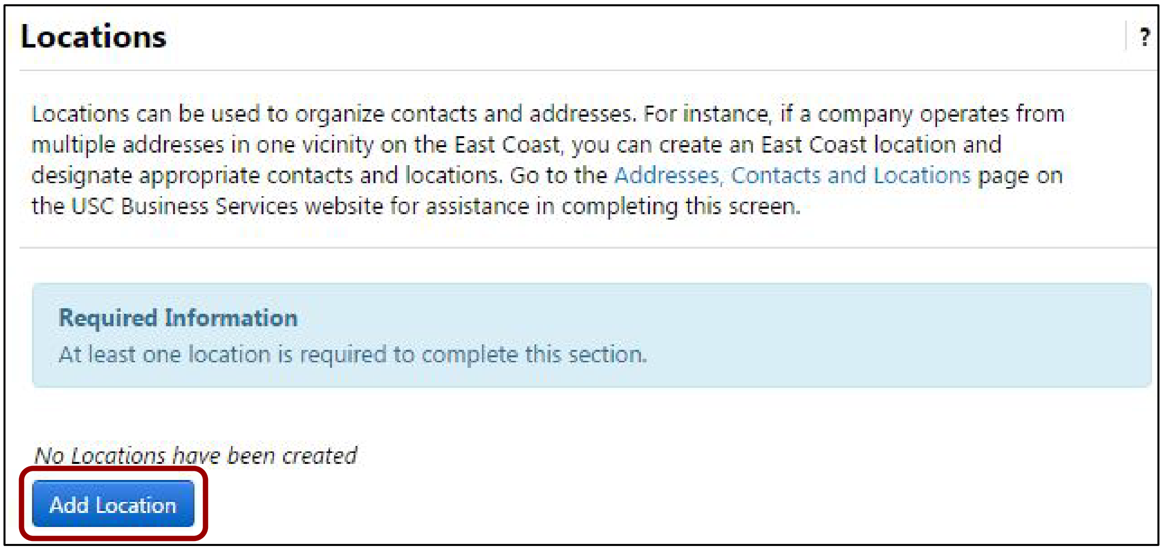
Click the **Save Changes** button to close the **Manage Associated Addresses** window.



Locations

All suppliers are required to have at least **one Location listed with contact information and address**. In case of multiple locations, suppliers can organize based on vicinity such as “East Cost Location.” The location type for all locations is **Fulfillment Center**.

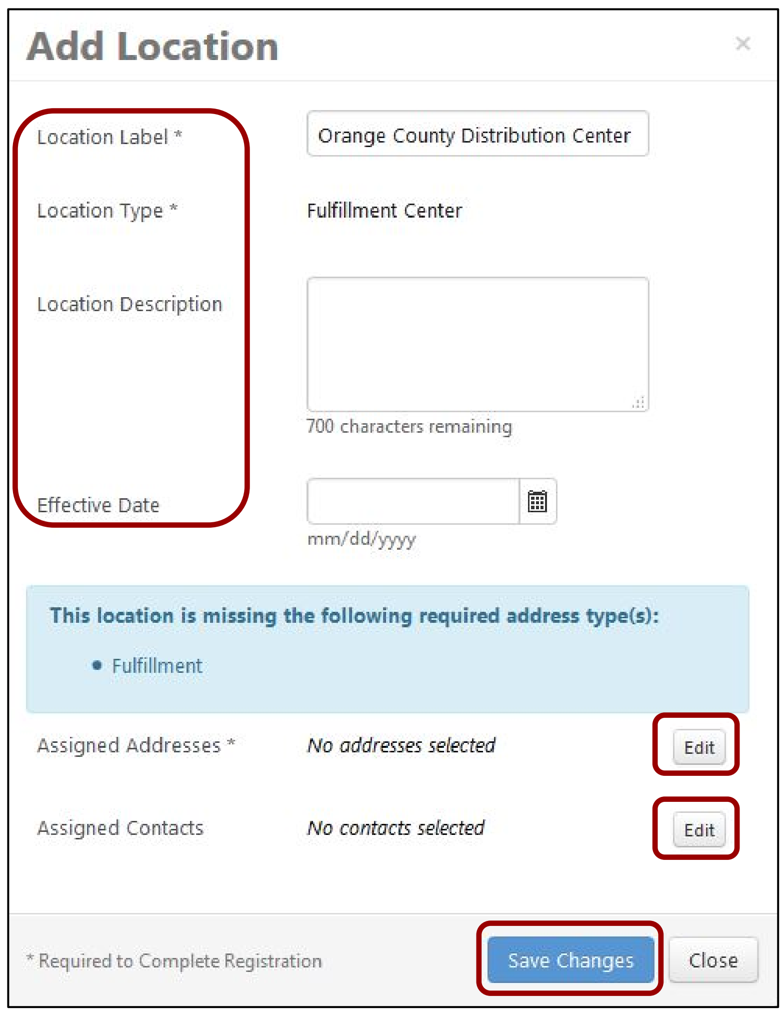
Click on the **Add Location** button to add a location.



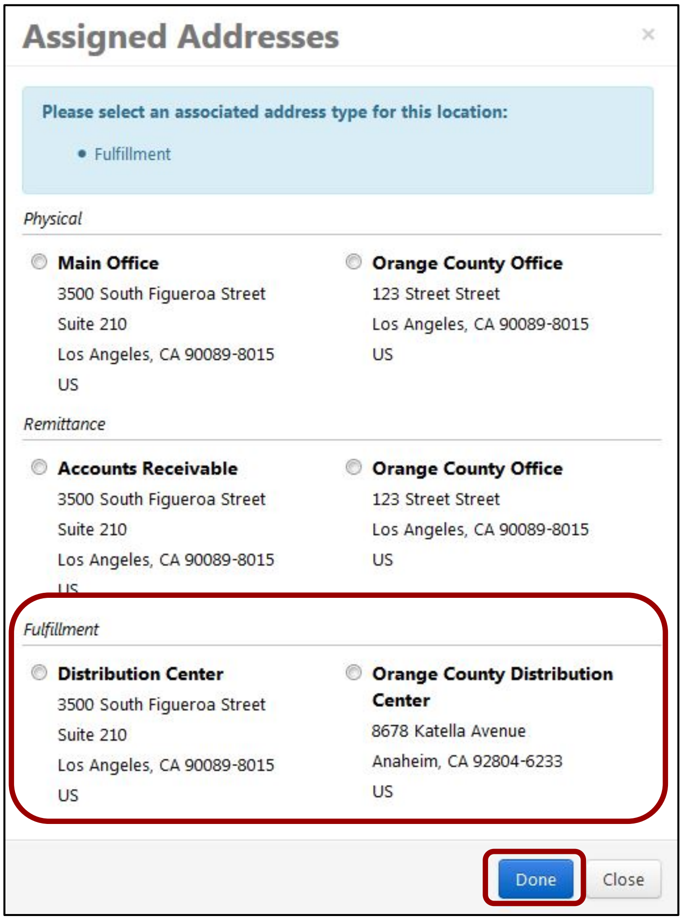
For all locations, enter:

- **Location Label**
- **Location Description**
- **Effective Date**

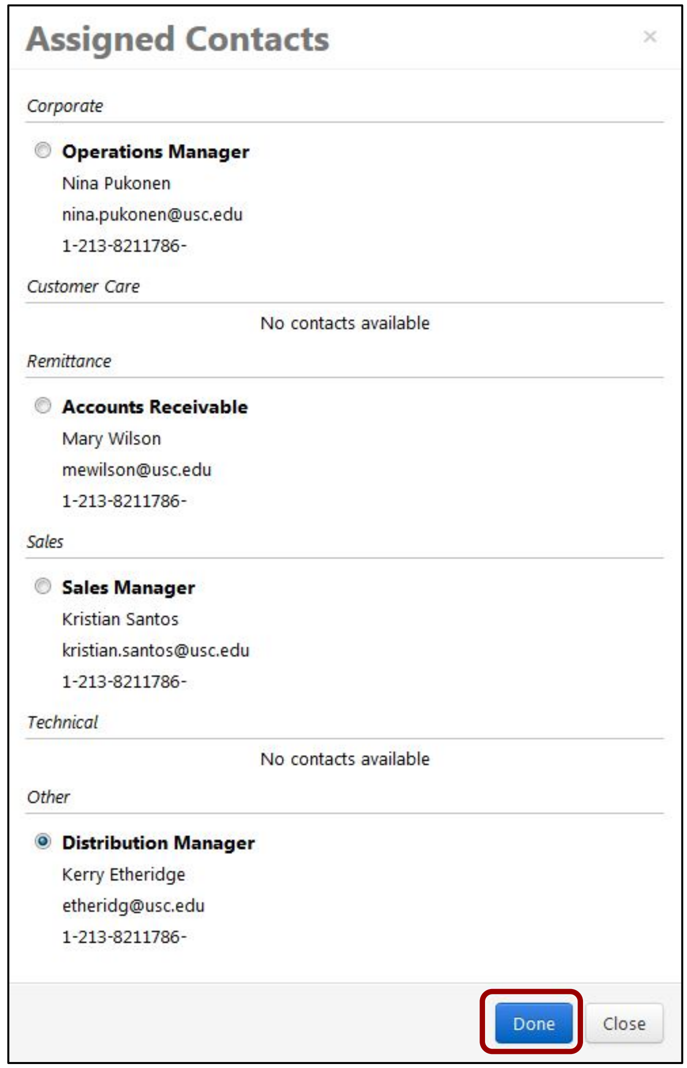
Click the **Edit** buttons to assign addresses (required) and contacts (optional) to the location.



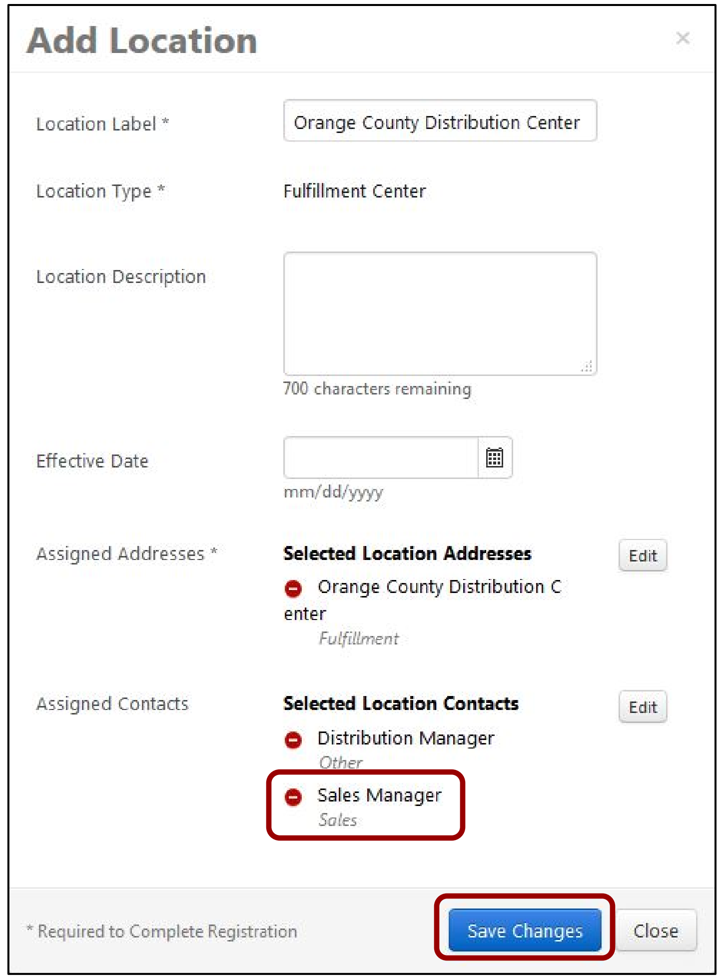
Select at least one **Fulfillment** address (multiple addresses can be added to a single location, but only one of each **Address Type**); click the **Done** button.



Select any **Contacts** (multiple contacts can be added to a single location, but only one of each **Contact Type**); click the **Done** button.



To remove an **Assigned Address** or **Assigned Contact**, click the **red minus sign** next to it; click the **Save Changes** button to return to the **Locations** main page.

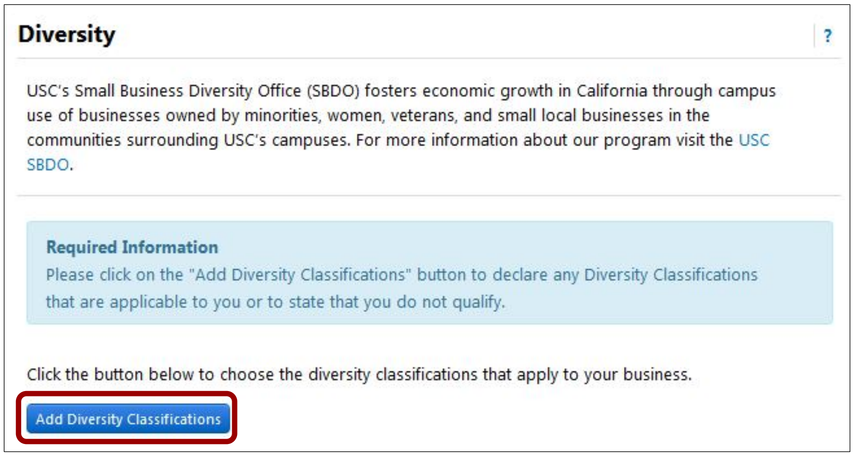


Click on the **Edit** button to modify an existing **Location**.

Diversity

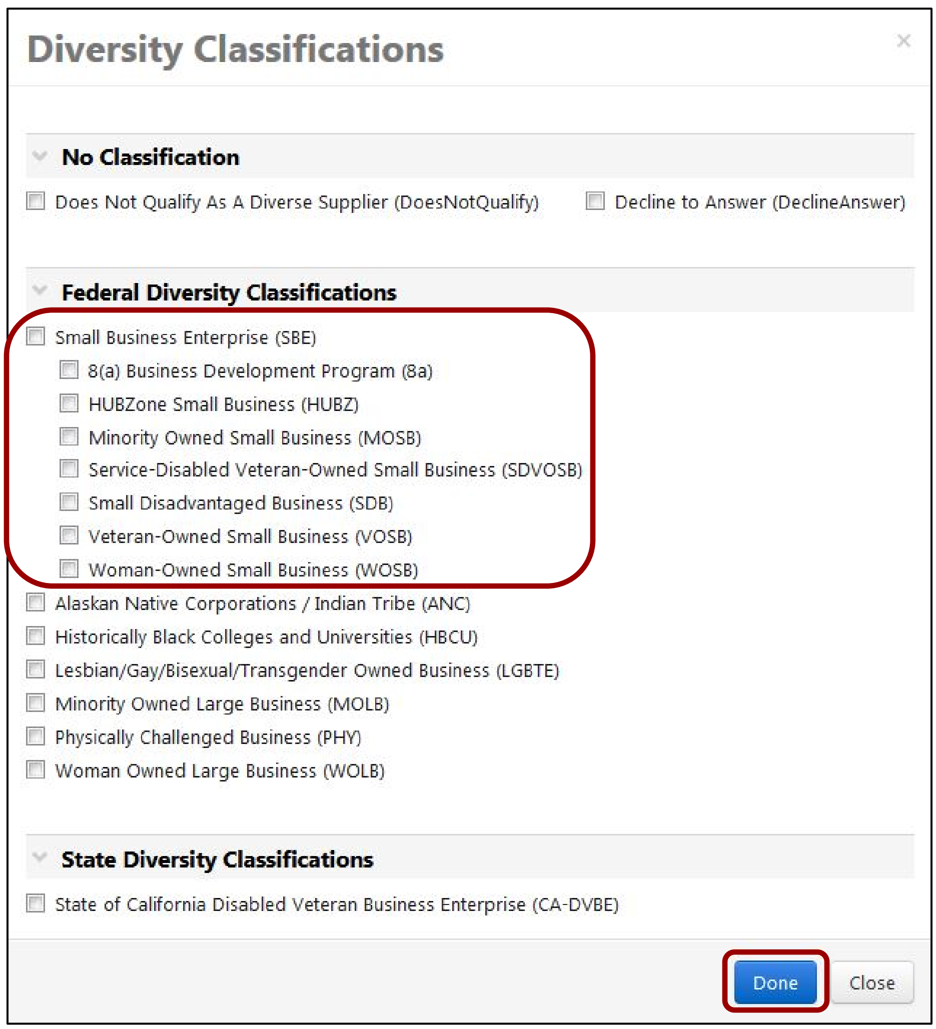
All suppliers must specify whether or not they want to declare a diversity classification.

- Click on the **Add Diversity Classification** button.



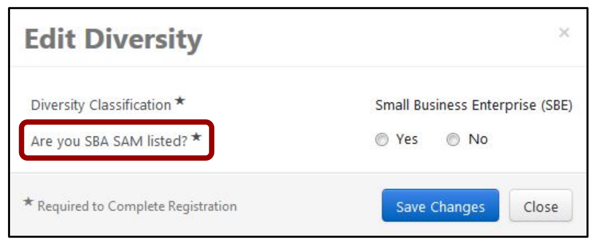
- Check the applicable boxes and click the **Done** button.

  Note: Suppliers that declare the SBE classification must select at least one classification under **Small Business Enterprise**.

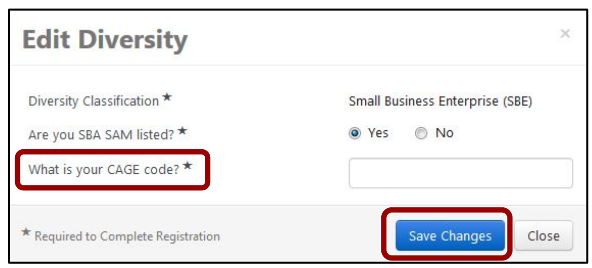


- Click the **Edit** drop-down for the classification(s) listed under **Diversity Classification**.

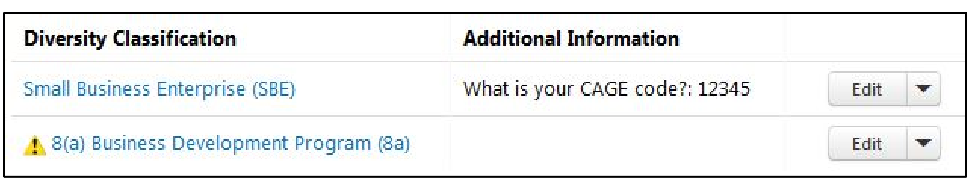
- Select **Yes** to the question **Are you SAM listed?** if your business is included in the System for Award Management (SAM) database.



- Enter your **CAGE code**. This is your company's five-character Commercial and Government Entity (CAGE) code.

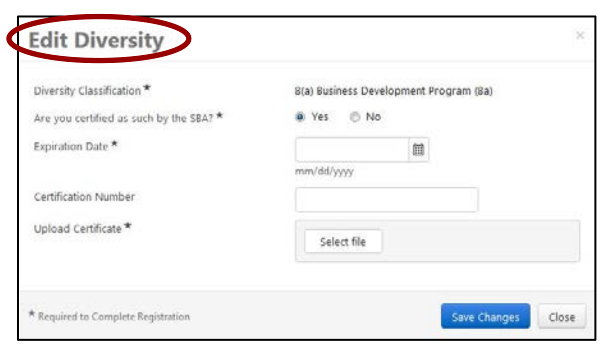


- Click the **Save Changes** button to return to the **Diversity** section.



Repeat the steps above to add other diversity classifications.

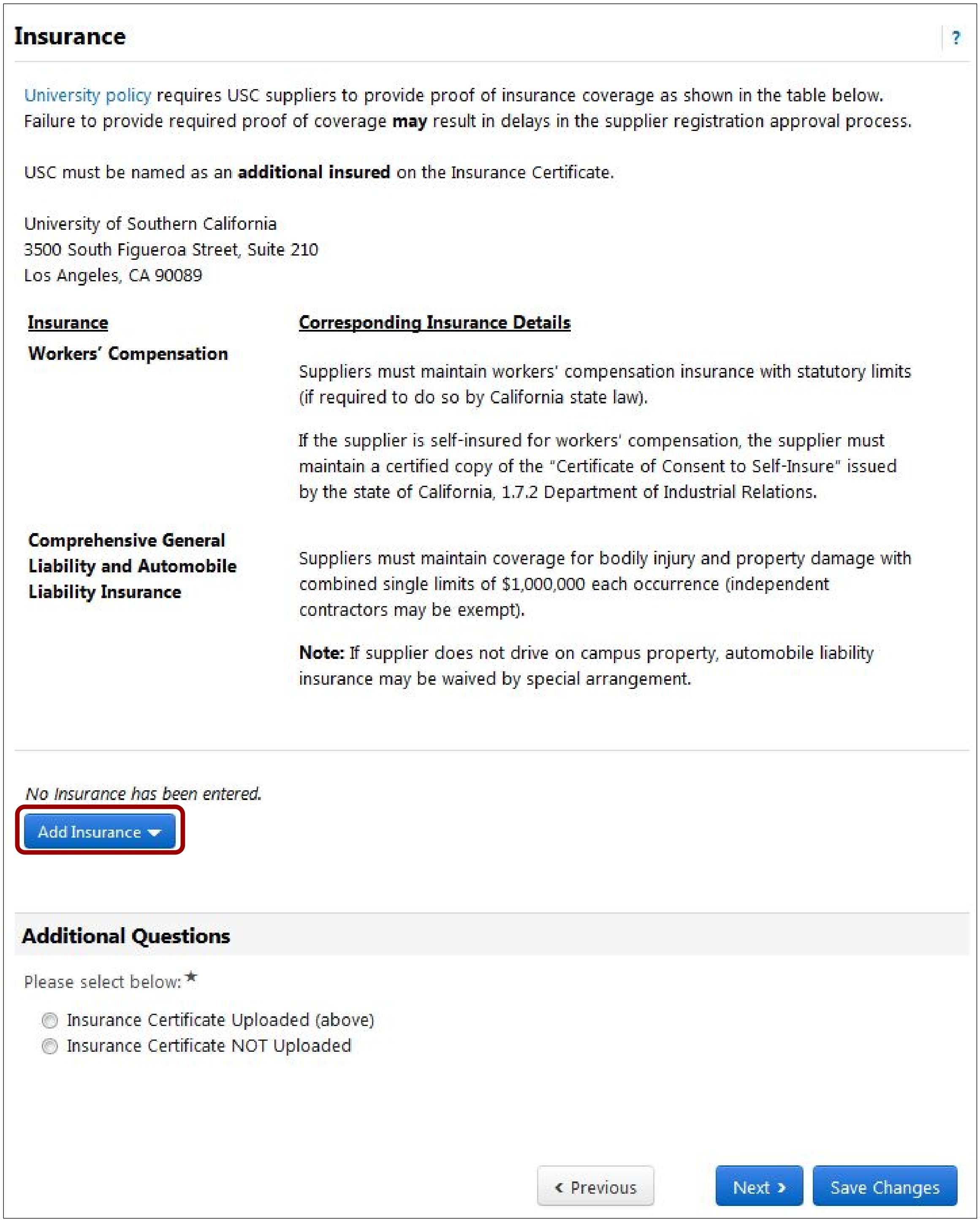
Each classification has its own requirements for completion, so follow the prompts on the **Edit Diversity** screen. For example, some classifications (8a, HUBZone, etc.) require proof of SBA certification.



Insurance

All USC suppliers are required to provide and maintain current proof of insurance coverage that meets or exceeds the minimum limits according to university policy.

- Click on the **Add Insurance** drop-down and select the appropriate type of insurance.



Insurance

?

University policy requires USC suppliers to provide proof of insurance coverage as shown in the table below. Failure to provide required proof of coverage **may** result in delays in the supplier registration approval process.

USC must be named as an **additional insured** on the Insurance Certificate.

University of Southern California
3500 South Figueroa Street, Suite 210
Los Angeles, CA 90089

Insurance	Corresponding Insurance Details
Workers' Compensation	Suppliers must maintain workers' compensation insurance with statutory limits (if required to do so by California state law). If the supplier is self-insured for workers' compensation, the supplier must maintain a certified copy of the "Certificate of Consent to Self-Insure" issued by the state of California, 1.7.2 Department of Industrial Relations.
Comprehensive General Liability and Automobile Liability Insurance	Suppliers must maintain coverage for bodily injury and property damage with combined single limits of $1,000,000 each occurrence (independent contractors may be exempt). **Note:** If supplier does not drive on campus property, automobile liability insurance may be waived by special arrangement.

No Insurance has been entered.

Add Insurance

Additional Questions

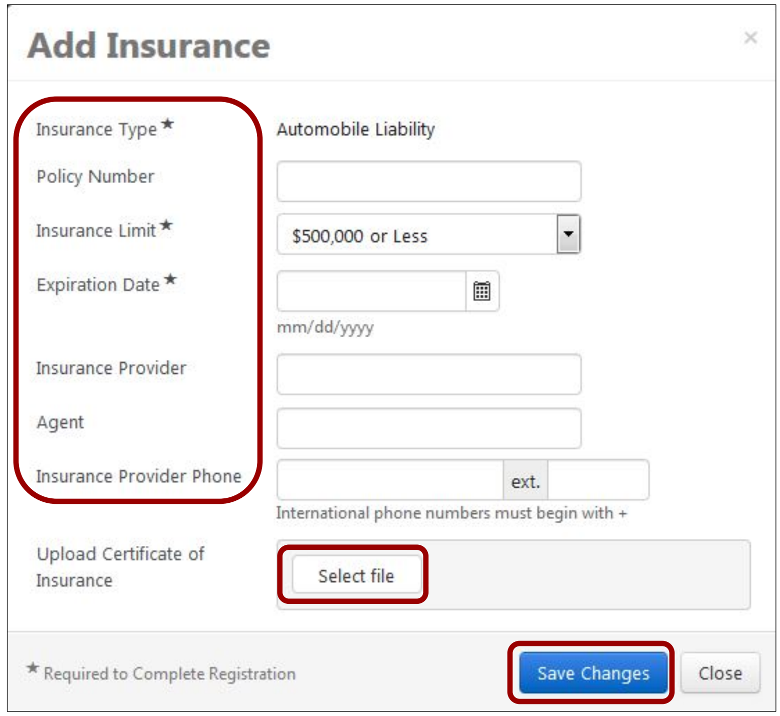
Please select below: *

- Insurance Certificate Uploaded (above)
- Insurance Certificate NOT Uploaded

‹ Previous Next › Save Changes

For all insurance types, enter:

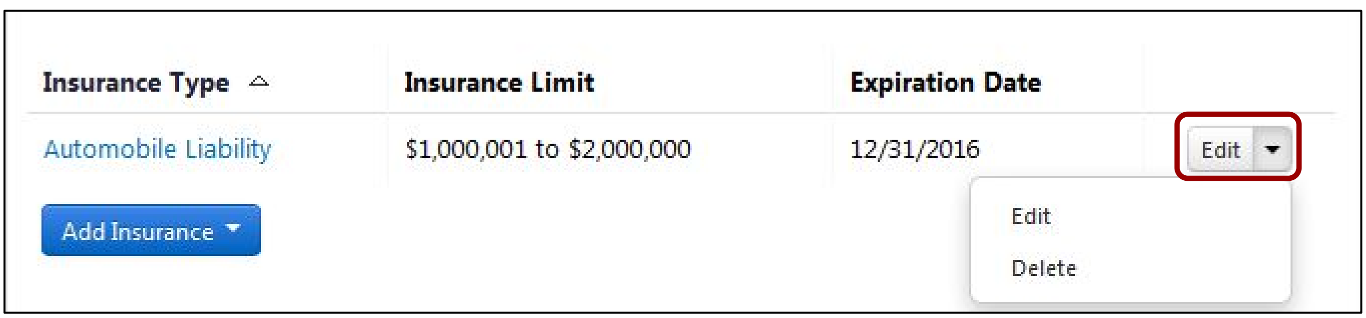
- **Policy Number**
- **Insurance Limit**
- **Expiration Date**
- **Insurance Provider**
- **Agent**
- **Insurance Provider Phone/ext.**



- Click the **Select file** button to upload a certificate of insurance.
- Click the **Save Changes** button to close the **Add Insurance** window.

Repeat the steps above to add other insurance types.

To edit or delete insurance information, click on the **Edit** drop-down.



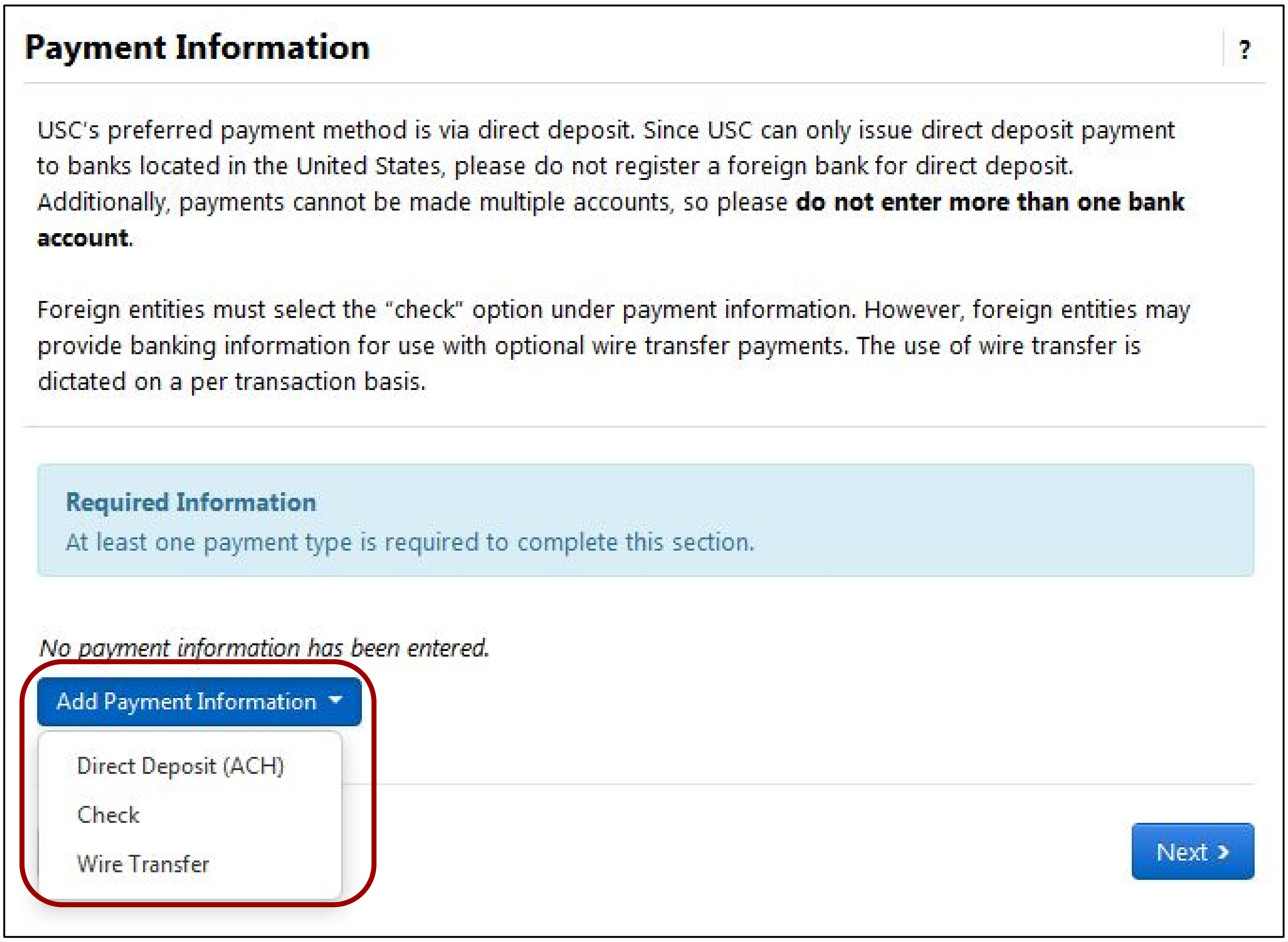
Payment Information

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

- Direct Deposit (ACH) – **preferred**
- Check

Note: 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.



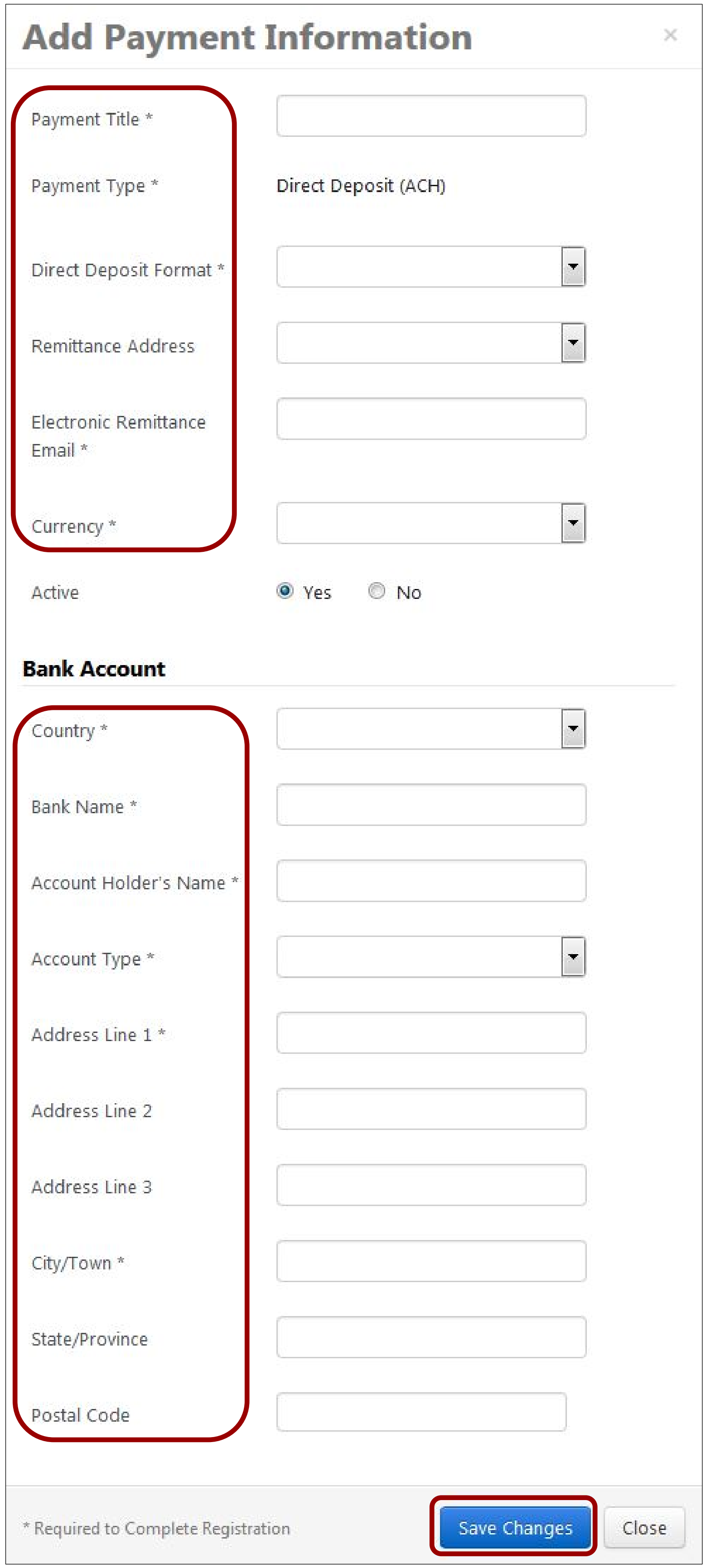
For direct deposit, enter:

- **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**

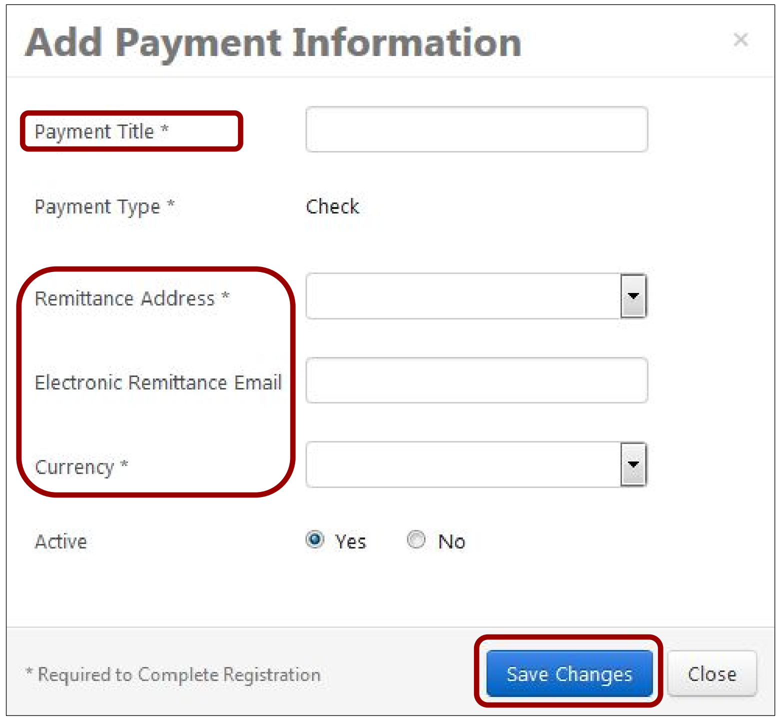
Click the **Save Changes** button to close the **Add Payment Information** window.



For check, enter:

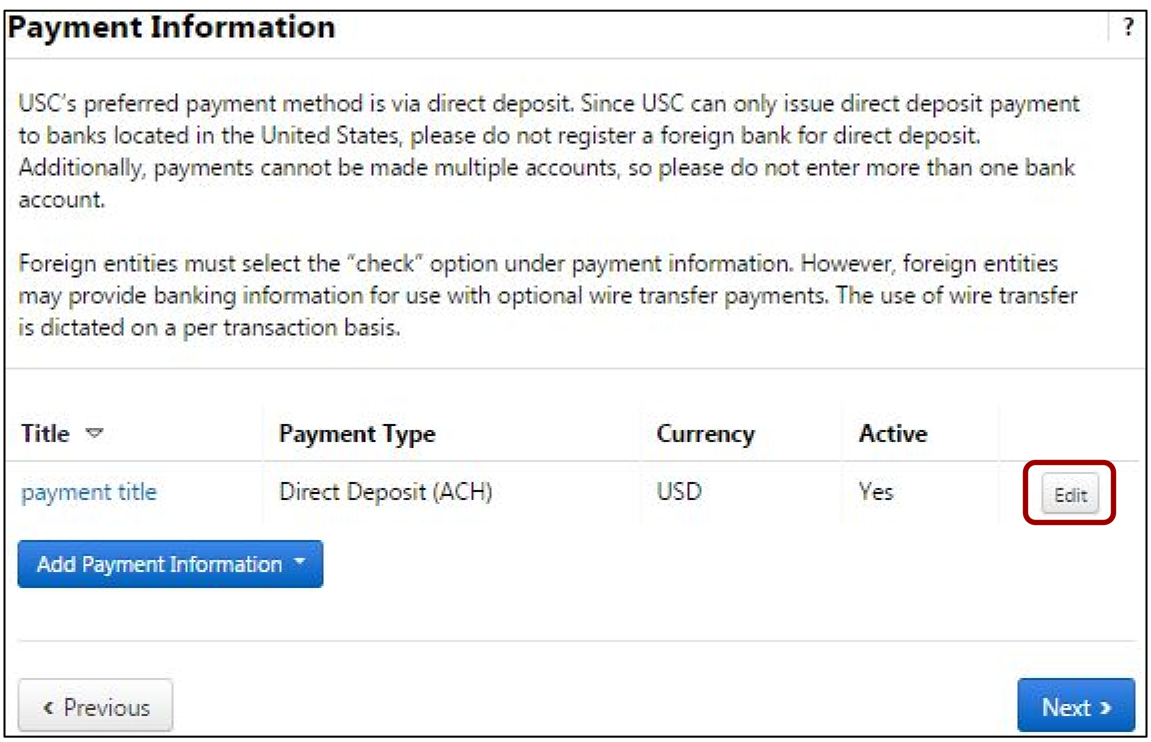
- **Payment Title**
- **Remittance Address**
- **Electronic Remittance Email**
- **Currency** (must be USD)

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.

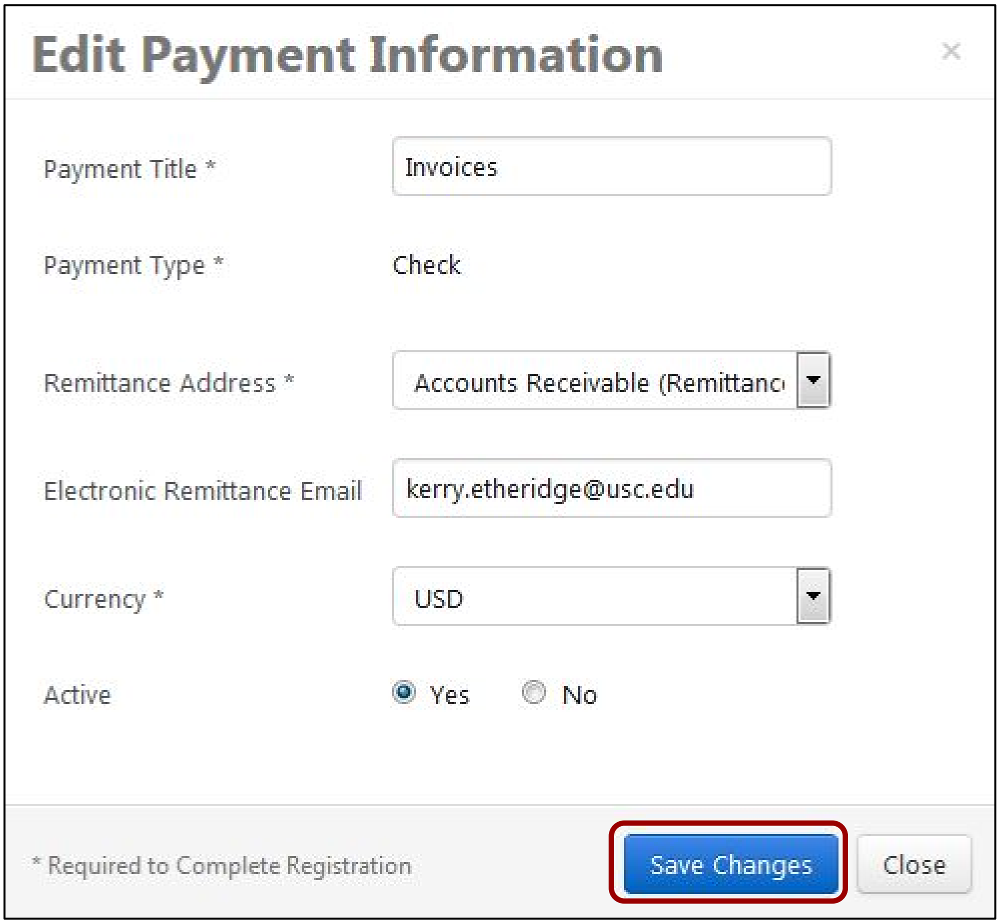
Note: Payments cannot be made to multiple accounts, so do not have more than one **Active** account.



- Click the **Edit** button to make changes to your payment information.

- Click the **Save Changes** button to return to the **Payment Information** section.

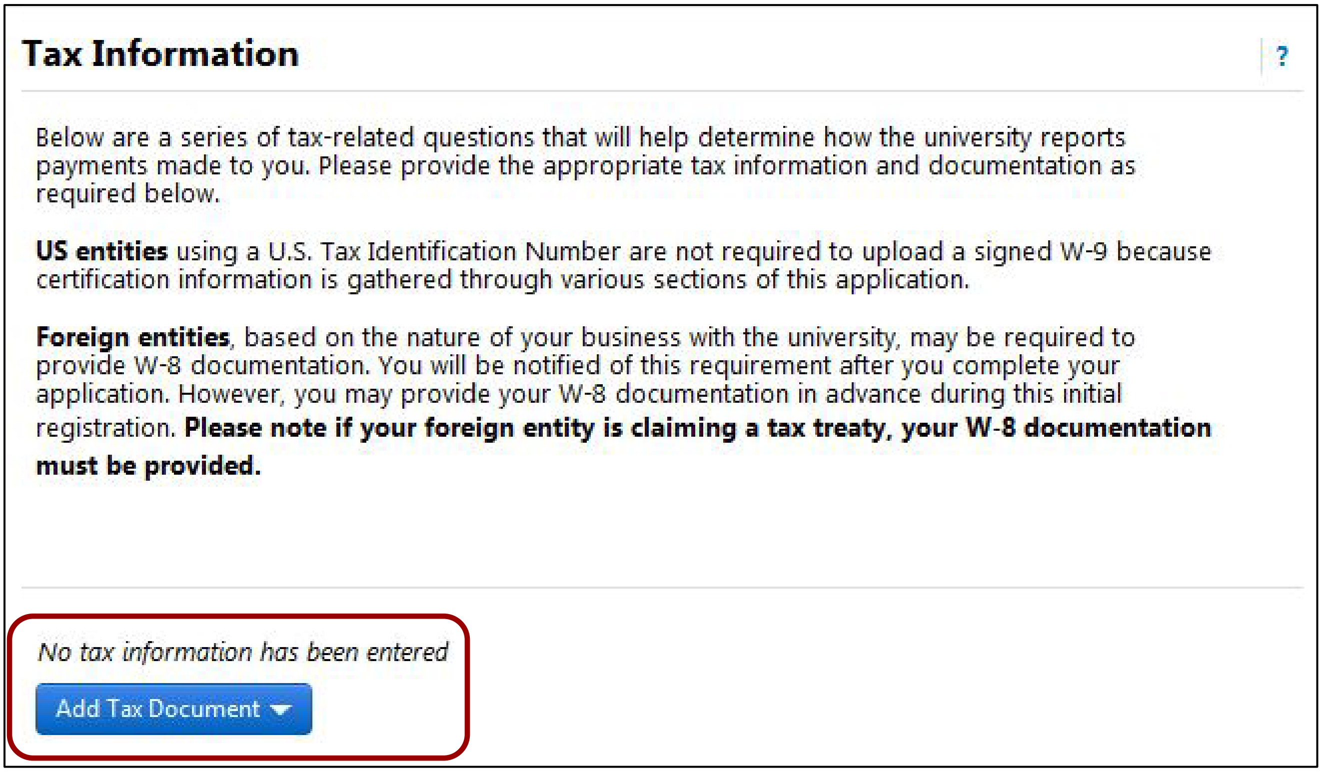
Note: You may not change existing bank account information. If you need to change accounts, inactivate the current account and create a new active account.



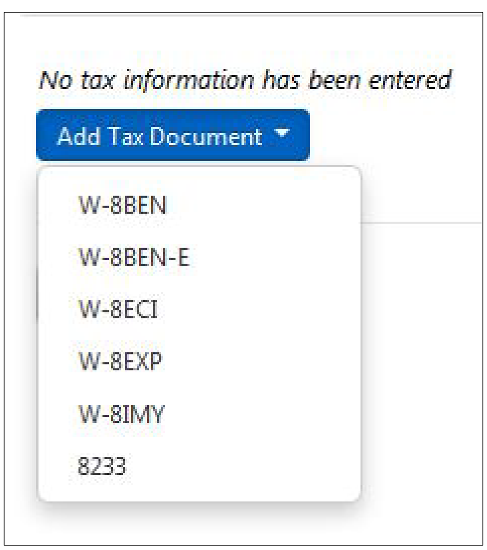
Tax Information

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.

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

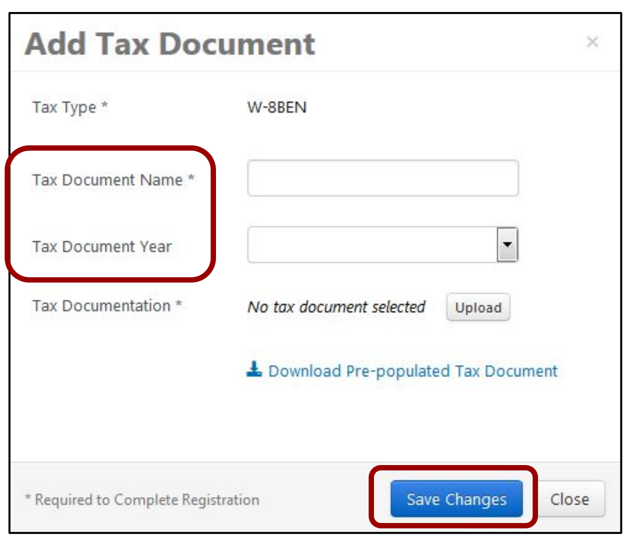


- Foreign entities should upload foreign tax forms before submitting registration.



For all tax types, enter:

- **Tax Document Name**
- **Tax Document Year**

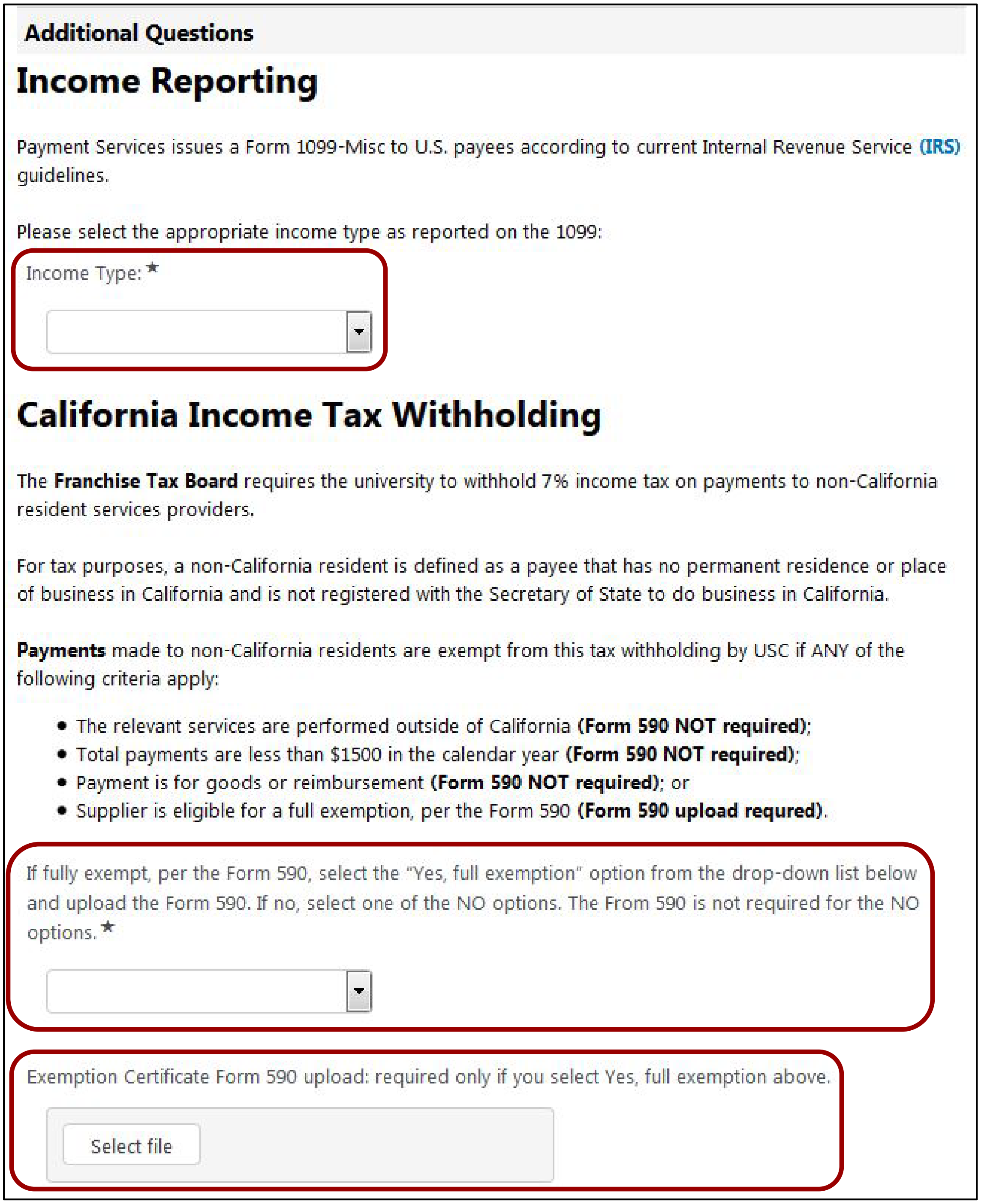


- Upload the tax document and click the **Save Changes** button to close the **Add Tax Document** window.

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** and whether you are **eligible for nonresident withholding**.

- Select the appropriate **Income Type** under **Income Reporting**.
- Indicate whether your business is eligible for an exemption from **California Income Tax Withholding**.
- If your business is eligible for an exemption, upload an **Exemption Certificate Form 590**.



Additional Questions

Income Reporting

Payment Services issues a Form 1099-Misc to U.S. payees according to current Internal Revenue Service (IRS) guidelines.

Please select the appropriate income type as reported on the 1099:

Income Type: *

California Income Tax Withholding

The **Franchise Tax Board** requires the university to withhold 7% income tax on payments to non-California resident services providers.

For tax purposes, a non-California resident is defined as a payee that has no permanent residence or place of business in California and is not registered with the Secretary of State to do business in California.

Payments made to non-California residents are exempt from this tax withholding by USC if ANY of the following criteria apply:

- The relevant services are performed outside of California **(Form 590 NOT required)**;
- Total payments are less than $1500 in the calendar year **(Form 590 NOT required)**;
- Payment is for goods or reimbursement **(Form 590 NOT required)**; or
- Supplier is eligible for a full exemption, per the Form 590 **(Form 590 upload requred)**.

If fully exempt, per the Form 590, select the "Yes, full exemption" option from the drop-down list below and upload the Form 590. If no, select one of the NO options. The From 590 is not required for the NO options. *

Exemption Certificate Form 590 upload: required only if you select Yes, full exemption above.

Select file

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

Exemption from FATCA Reporting Codes per W-9 Instructions

The Foreign Account Tax Compliance Act (FATCA) requires a participating foreign financial institution to report all United States account holders that are specified United States persons. Certain payees are exempt from FATCA reporting. Please visit the IRS website for more information.

If applicable, please indicate your FATCA Exemption Code below. If none of the codes apply, select the **Non-exempt from back-up withholding and/or FATCA reporting** option from the drop-down list below.

Select FATCA Exemption Code: *

NA - Non-exempt from back-up withholding/FATCA

A - An organization exempt from tax under section 501(a) or any individual retirement plan as defined in section 7701(a)(37)

B - The United States or any of its agencies or instrumentalities

C - A state, the District of Columbia, a U.S. commonwealth or possession, or any of their political subdivisions or instrumentalities

D - A corporation the stock of which is regularly traded on one or more established securities markets, as described in Regulations section 1.1472-1(c)(1)(i)

E - A corporation that is a member of the same expanded affiliated group as a corporation described in Regulations section 1.1472-1(c)(1)(i)

F - A dealer in securities, commodities, or derivative financial instruments (including notional principal contracts, futures, forwards, and options) that is registered as such under the laws of the United States or any state

G - A real estate investment trust

H - A regulated investment company as defined in section 851 or an entity registered at all times during the tax year under the Investment Company Act of 1940

I - A common trust fund as defined in section 584(a)

J - A bank as defined in section 581

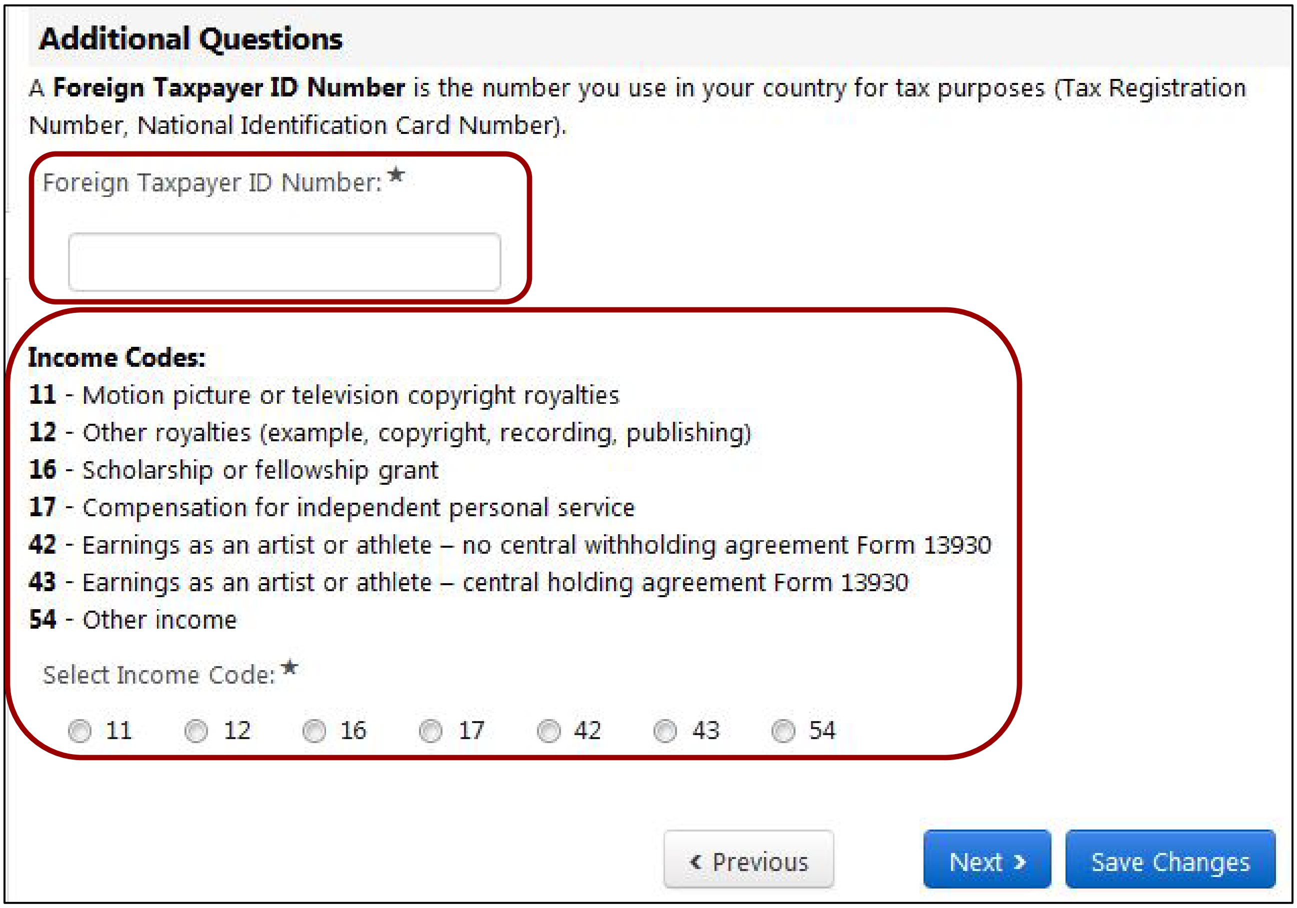
K - A broker

L - A trust exempt from tax under section 664 or described in section 4947(a)(1)

M - A tax exempt trust under a section 403(b) plan or section 457(g) plan

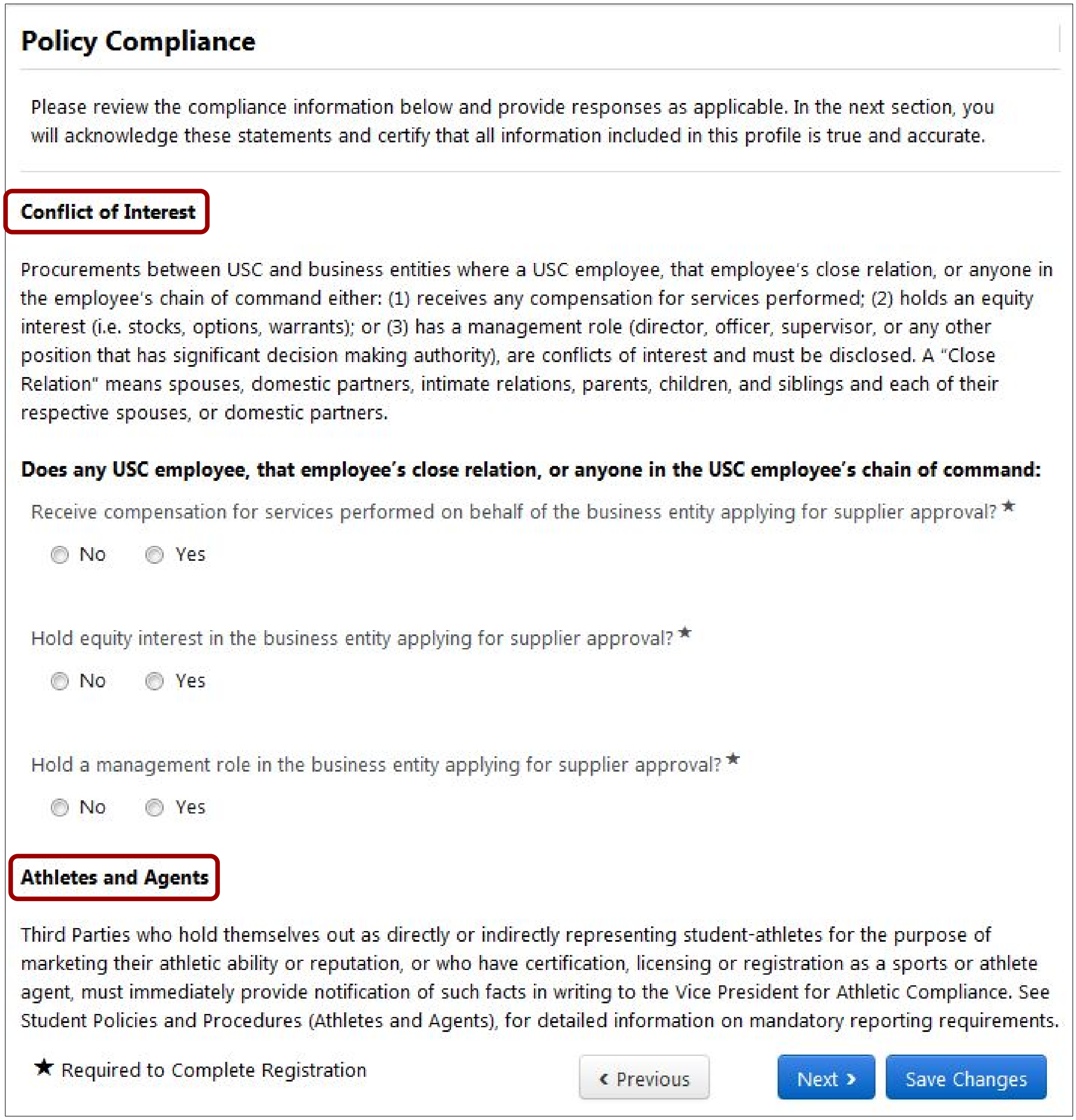
‹ Previous   Next ›   Save Changes

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 **Foreign Taxpayer ID Number** and **Income Code**.



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, intimate relations, parents, children, and siblings and each of their respective spouses, or domestic partners.

Does any USC employee, that employee's close relation, or anyone in the USC employee's chain of command:

Receive compensation for services performed on behalf of the business entity applying for supplier approval? ★

No Yes

Hold equity interest in the business entity applying for supplier approval? ★

No Yes

Hold a management role in the business entity applying for supplier approval? ★

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.

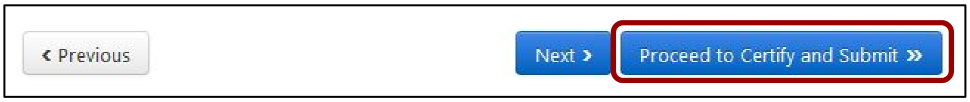
★ Required to Complete Registration

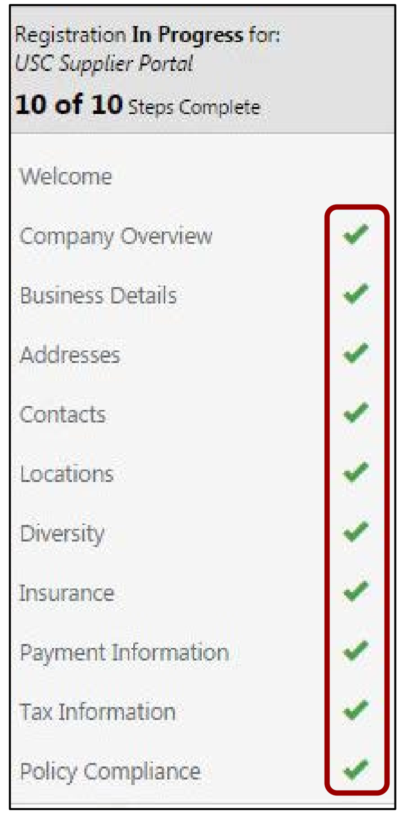
‹ Previous Next › Save Changes

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.

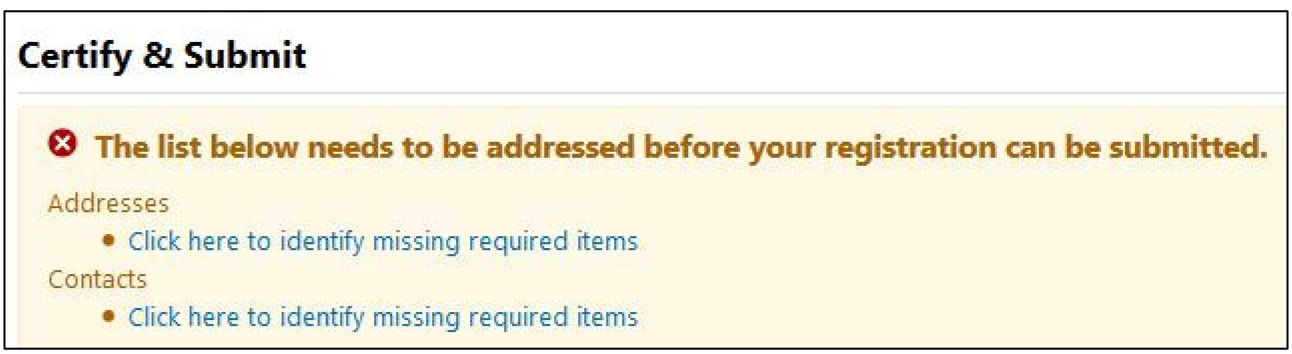
- Click the **Proceed to Certify and Submit** button to go to the **Certify & Submit** section.





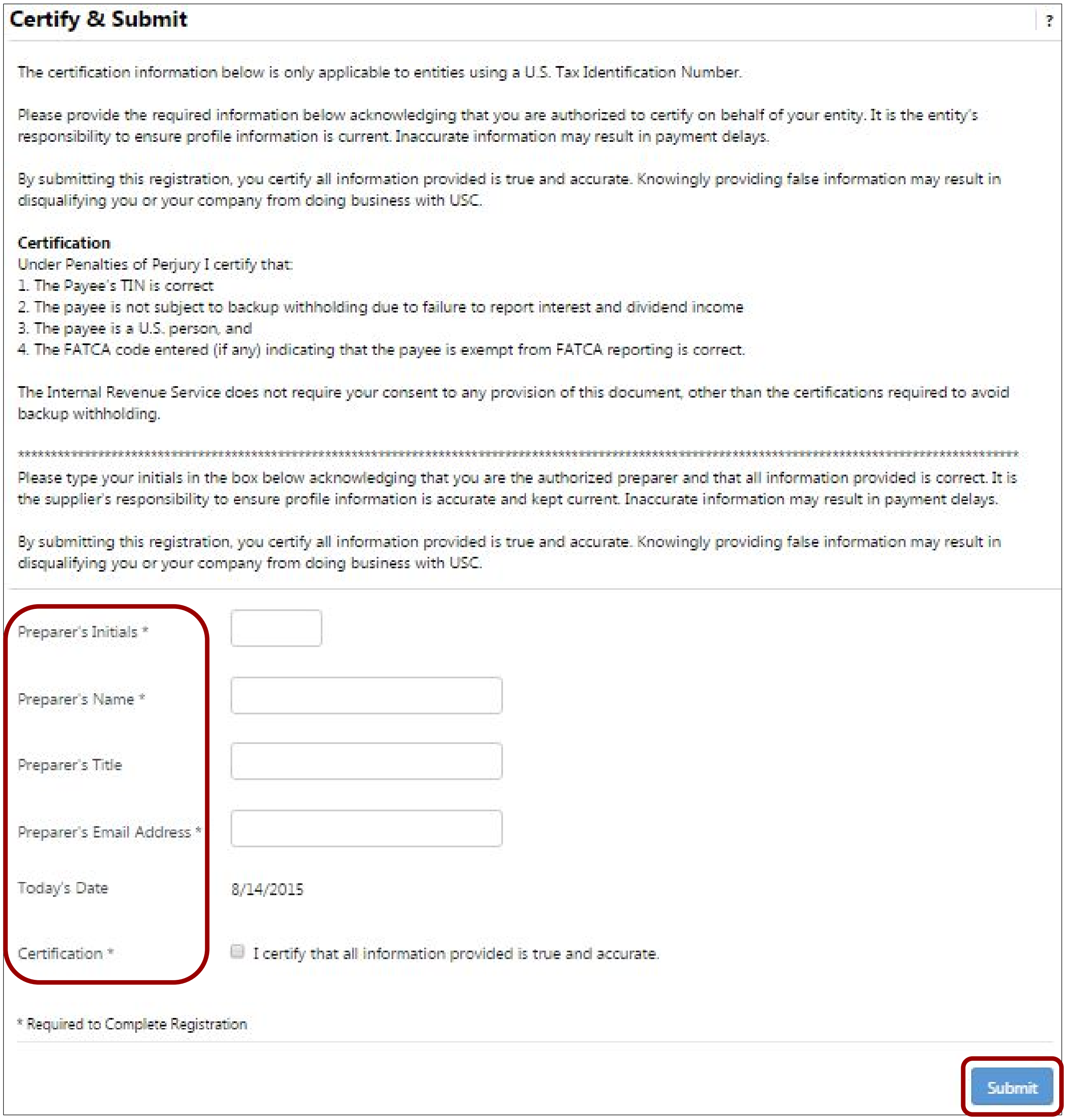
If you access the **Certify & Submit** section without seeing the **Proceed to Certify and Submit** button, a list of missing items is displayed at the top of the section.

- 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 Title

Preparer's Email Address *

Today's Date 8/14/2015

Certification * I certify that all information provided is true and accurate.

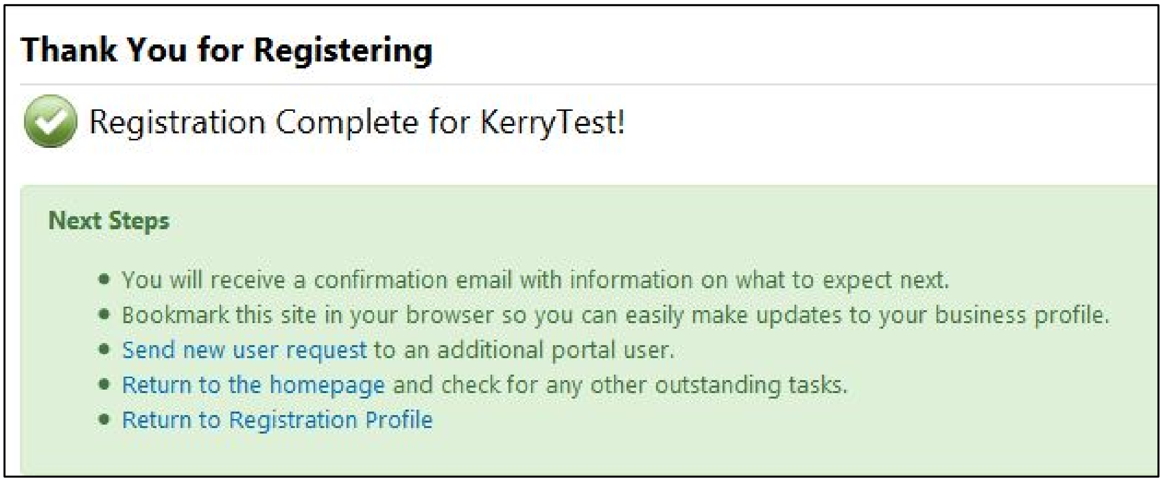
* Required to Complete Registration

Submit

Thank You for Registering

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

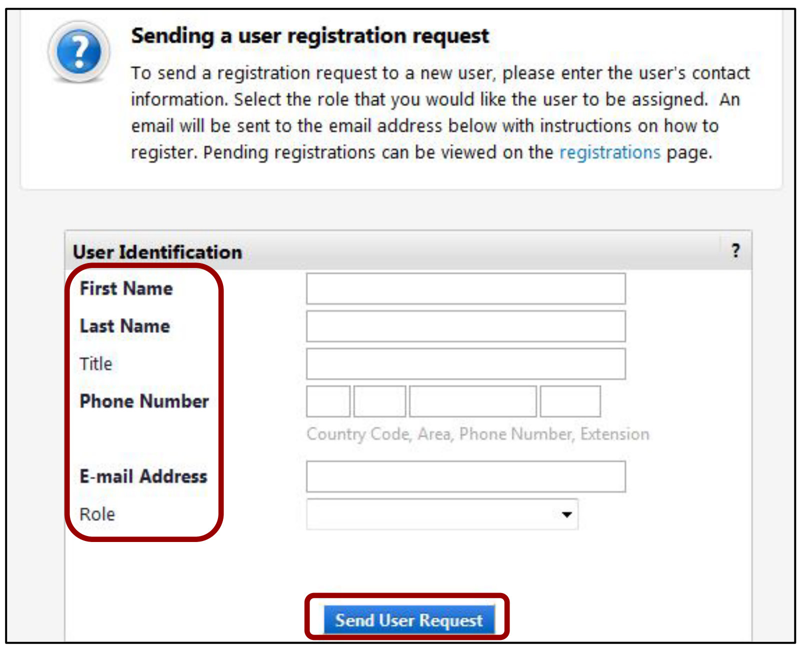
- Return to your registration profile
- Return to the supplier portal homepage
- Send a request for additional users to have access to your profile

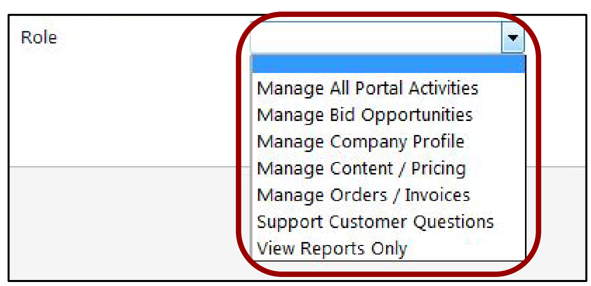


User registration request:

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.

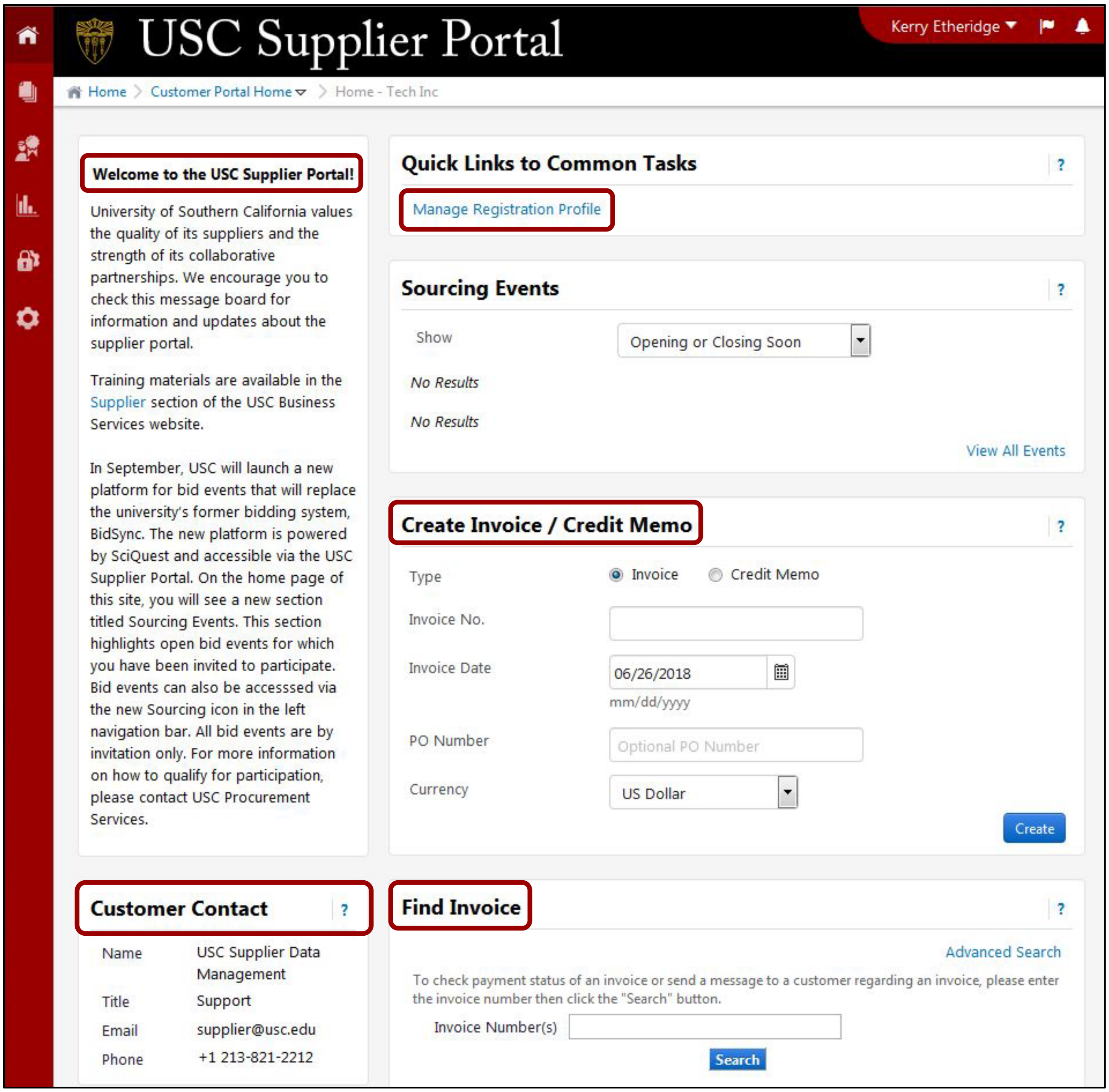




USC Supplier Portal homepage:

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).

  Preferred Time Zone: 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 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.

Business Details (p. 8):

- **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.

- **Additional Questions:**

  Number of Employees: Self-explanatory.

  Date Business was Established: Self-explanatory.

  Annual Sales Volume: Self-explanatory.

  Note: If the supplier is a caterer, additional commodity-specific questions will display on this screen. If the supplier's products and/or services fall into commodity categories related to construction or healthcare, an additional section will appear with commodity-specific questions.

Addresses (p. 9):

- **Basic Information (Step 1 of 4)**:

  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 4)**:

  How would you like to receive purchase orders for this fulfillment address?: Only displays when **Takes Orders** is selected on Basic Information screen.

  Email: Only displays when **Email** is selected in field above.

  Confirm Email: Only displays when **Email** is selected in field above.

  Fax: Only displays when **Fax** is selected in field above.

  Country: 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.

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 4)**:

  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.

- **Assign this Address to a Location (Step 4 of 4)**

  Note: Use Existing Location is the default selection. Select an existing location from the **Location** drop-down list or select **Enter New Location** to add a new location.

  What would you like to label this location? : Self-explanatory.

  Description: Self-explanatory.

Contacts (p. 15):

To open the Add Contact screen, select a contact type from the **Add Contact** drop-down list.

- **Add Contact:**

  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.

Locations (p. 20):

To open the Add Location screen, select a location type from the **Add Location** drop-down list.

- **Add Location:**

  Location Label: Self-explanatory.

  Location Type: Self-explanatory.

  Location Description: Self-explanatory.

  Effective Date: Self-explanatory.

  Assigned Addresses: Add and remove existing **Addresses** from a location.

  Assigned Contacts: Add and remove existing **Contacts** from a location.

Diversity (p. 23):

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.

Insurance (p. 25):

- **Add Insurance:**

  Insurance Type: Selected from Add Insurance drop-down.

  Policy Number: Self-explanatory.

  Insurance Limit: Select appropriate value from drop-down list.

  Expiration Date: Self-explanatory. Enter manually in required format or click on calendar icon and click on expiration date to populate field.

  Insurance Provider: Name of insurance company (i.e., State Farm, Farmers, etc.).

  Agent: Name of insurance agent or agency.

  Insurance Provider Phone: Self-explanatory.

  Upload Certificate of Insurance: Proof of current insurance coverage naming USC as additional insured.

Payment Information (p. 27):

- **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. 31):

- **Add Tax Document:**

  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.):**

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

  If fully exempt, per the Form 590, select the "Yes, full exemption" option from the drop-down list below and upload the Form 590. If no, select one of the NO options. The Form 590 is not required for the NO options.: 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.

  Select FATCA Exemption Code: Indicates reason for exemption from FATCA reporting.

- **Additional Questions (Foreign):**

  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.

Policy Compliance (p. 35):

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. 36):

Preparer's Initials: Self-explanatory.

Preparer's Name: Self-explanatory.

Preparer's Title: Self-explanatory.

Preparer's Email Address: Self-explanatory.

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