Carnegie Mellon University
Finance Division

US Supplier Information Package

Dear Supplier:

The purpose of this set of forms is to provide Carnegie Mellon with appropriate and accurate information in order to add you or your company to the university's financial system. Only once your registration is complete can you receive university purchase orders and payments.

Within this package you will find:

- Carnegie Mellon University Supplier Information - US and instructions
- United States Form W-9 with instructions
- Pennsylvania 1099-MISC Withholding Exemption Certificate and instructions

Note: If you are an existing supplier updating your name, taxpayer identification number (TIN), organization type or mailing address per your IRS tax return, select "Update information for existing supplier" at the top of the Supplier Information Form – US and provide an updated form W-9 and Pennsylvania 1099-MISC Withholding Exemption Certificate.

To help ensure timely payment, please provide bank instructions on the Supplier Information Form - US in order to receive your payment via Electronic Funds transfer.

The completed forms should be submitted to your purchasing contact at the university. A CMU representative will contact you to verify the banking information you provided.

If you have questions related to the university's purchasing policies, procedures or any of the enclosed forms, please refer to your university purchasing contact, or reference our website at https://www.cmu.edu/finance/procurementservices.

Thank you for your participation,

Carnegie Mellon Accounts Payable Department

Enclosures

Instructions for the Supplier Information Package – US

- Identify whether you are a new supplier, doing business with CMU for the first time, or if you are updating existing information previously submitted to CMU.
- For questions regarding if the supplier is a US citizen or entity, please contact the university Taxation Department at **412-268-5322.**
- Identify if you will be providing only a product, only a service, or both products and services to Carnegie Mellon University and provide a brief description of those products/services.
- To help ensure timely payment, provide your bank information in order to receive your payment via Electronic Funds Transfer. Be sure to include an accurate email address to ensure you receive your electronic remittance. A CMU representative will contact you to verify the banking information you provided.
- To assist you with the PA Income Tax Withholding question please review the following guidance. Pennsylvania income tax is required to be withheld at a rate of 3.07% on payments reported on a Form 1099-MISC of Pennsylvania source non-employee compensation or business income to a non-resident individual or a single member LLC with a nonresident owner. This nonresident withholding requirement does not apply to payments for goods and materials or wages paid to employees.
    1. If Form W-9's Box 3 "Individual/sole proprietor or single-member LLC" is checked, a supplier may be subject to PA income tax withholding.
        a. If the individual/sole proprietor or member of the single-member LLC is not a resident of PA (see Pennsylvania Form REV-611 [.pdf] for guidance on PA residency), the supplier may be subject to PA withholding.
        b. If the supplier is not a resident of PA and is providing services to CMU inside the Commonwealth of Pennsylvania, the supplier is subject to PA income tax withholding. Please select "Yes" on the Supplier Information Form - US. Pennsylvania income tax of 3.07% will be withheld on your payments and remitted to the Commonwealth of Pennsylvania on your behalf.
    2. If the supplier is a resident of PA per the above guidance, the supplier is not subject to PA income tax withholding. Please select "No" on the Supplier Information Form - US and complete Form 1099 MISC Withholding Exemption Certificate.
    3. If any other option is selected on Form W-9 in box 3 besides "Individual/sole proprietor or single-member LLC", the supplier is not subject to PA income tax withholding. Please select "No" on the Supplier Information Form - US and complete Form 1099 MISC Withholding Exemption Certificate.

4. If the supplier is providing services OUTSIDE of the Commonwealth of Pennsylvania or if NO SERVICES are being provided to CMU (i.e. the sale of goods/products), the supplier is not subject to PA income tax withholding. Please select "No" on the Supplier Information Form – US and complete Form 1099 MISC Withholding Exemption Certificate.

On the Pennsylvania Form 1099 MISC Withholding Exemption Certificate the supplier should sign and complete the following sections: Payor Information, Payee Information, Exemption Reason, and Certification of Payee. If the supplier is using the exemption certificate located on CMU's website, the Payor section is already completed.

- Identify all applicable minority/disadvantaged business information. A summary of the information is provided on the link that is included on the form. If you have questions on the minority/disadvantaged business information that are not addressed by the website provided on the form, please contact the university Procurement Services Department at **procurement-inbox@andrew.cmu.edu.**
- Identify your Organization Type based on your organizational structure.
- If you/your organization are CCR certified, provide a copy of certification with the Supplier Information Form - US. The certification information can be found at the link provided on the form.
- Provide the name of your purchasing contact at Carnegie Mellon University and his/her email address or phone number.

The Supplier Information Form - US must be signed by an authorized representative of the company or the individual providing the service(s) if not a corporate legal entity. In addition to signing the form, please provide your contact information (email address and phone number).

*****PLEASE NOTE: INCOMPLETE FORMS WILL BE RETURNED TO THE SUPPLIER FOR COMPLETION AND COULD DELAY THE ORDER AND PAYMENT PROCESS.*****