

## Recipient How a Stipend Recipient Completes the Registration Process

Once a registration invitation is sent to the Stipend Recipient's email, the recipient will receive an email with appropriate link to begin the registration process.

1. Once the email invitation is received and opened, **Select the Register Now Button ❶** to start the process as shown below in **Figure 1**.

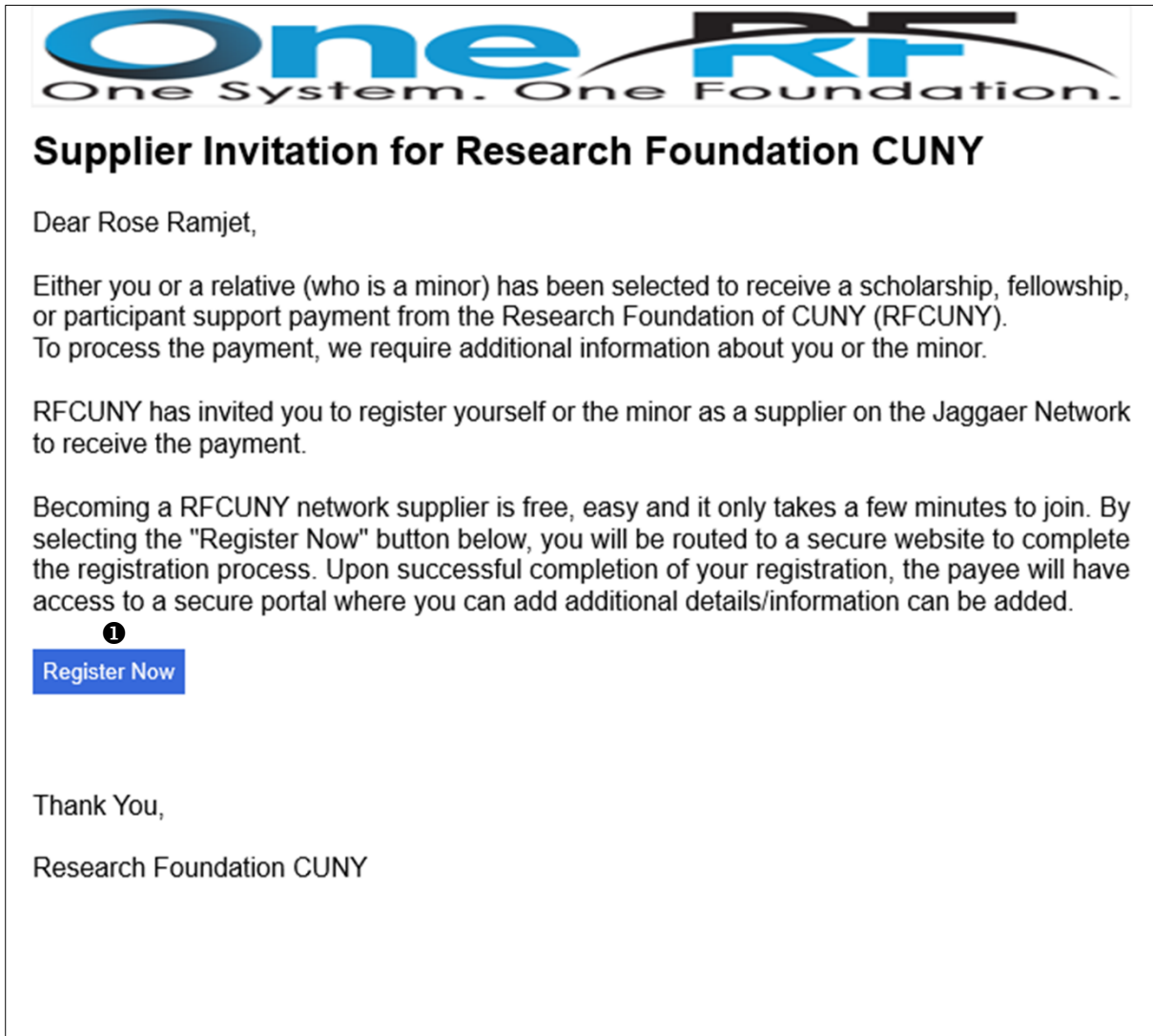


Figure 1

**Please Note:** OneRF is using the Supplier Registration format to register a Stipend Recipient. Whenever a supplier name is requested, please enter **your name**.

2. After clicking on the **Register Now Button ①** in **Figure 1, Page 1** on the welcome page, the **Welcome to Supplier Registration** screen will open as shown in **Figure 2 below**, then **click on Continue with Registration ①** after reviewing the appropriate information from RFCUNY.

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

## Welcome to Supplier Registration

English ▾

Thank you for your interest in partnering with the Research Foundation of CUNY. We value your engagement and look forward to establishing a successful relationship with you.

Please take a moment to review the instructions below:

1. Review our [Privacy and Terms of Use](#) Notice.
2. Create an account.
3. Complete supplier registration.
4. Ensure all required documentation is uploaded as requested.

You will be notified when your supplier registration has been approved.

①

[Continue With Registration](#)

Please contact Procurement and Payables at [RF\\_ProcurementPlus@rfcuny.org](mailto:RF_ProcurementPlus@rfcuny.org) or +212 4171111 for assistance.

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Figure 2

3. Next, create a **Supplier Account**. Start by completing the **Supplier Registration**. Complete all the Contact Information ❶ and Login Information ❷ to create the **Supplier Account** as shown in **Figure 3** below. Then **Select Create Account** ❸ when complete.

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Supplier Registration [Registration Tutorial](#) English ▾

This is the only way for you to access and update your supplier account information once registered.

❶ Your Contact Info

Rose Ramjet  
First Name ★ Last Name ★

Student  
Title

2015555555 ext.  
Phone Number ★  
International phone numbers must begin with +

EDT/EST - Eastern Standard Time (US/Eastern) ▾  
Preferred Time Zone ★

❷ Your Login

You are creating a JAGGAER One Login account. Once the account is created, you will be able to use this to access all JAGGAER applications using the same credentials. If you already have an account, please provide the details below.


rfcustomerservice@rfcuny.org  
Email ★

rfcustomerservice@rfcuny.org  
Confirm Email ★

testtest1234 .....  
Password ★ Re-Enter Password ★

I am a user in need of accessibility assistance

Terms and Conditions  
 I have read and accepted JAGGAER's [Terms and Conditions](#)

I am human   
hCaptcha  
Privacy · Terms

❸ Create Account

- The student will receive an email asking them to complete the registration as shown in **Figure 4 below**. Click on **Complete Registration Now ❶**.

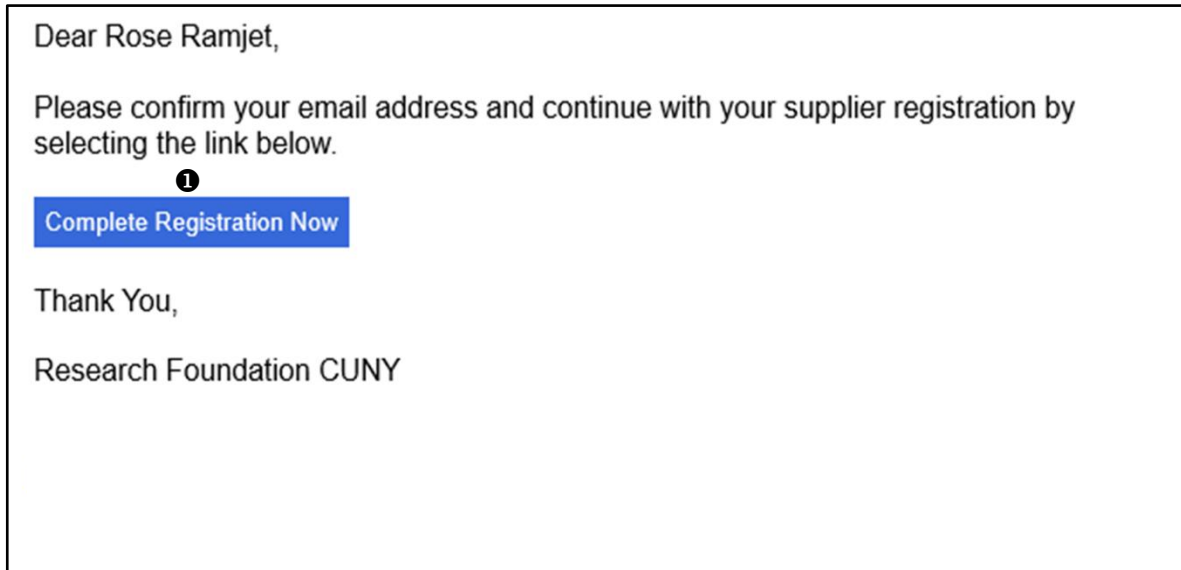


Figure 4

**Please Note:** You will get a message box stating your account is validated.  
**Click the Submit button.**

- After validating the account, the **Account Created Successfully** screen will appear as shown in **Figure 5 below**. Your **Email ❶** will auto-populate, fill in your Password, **❷** and click **Login ❸**.

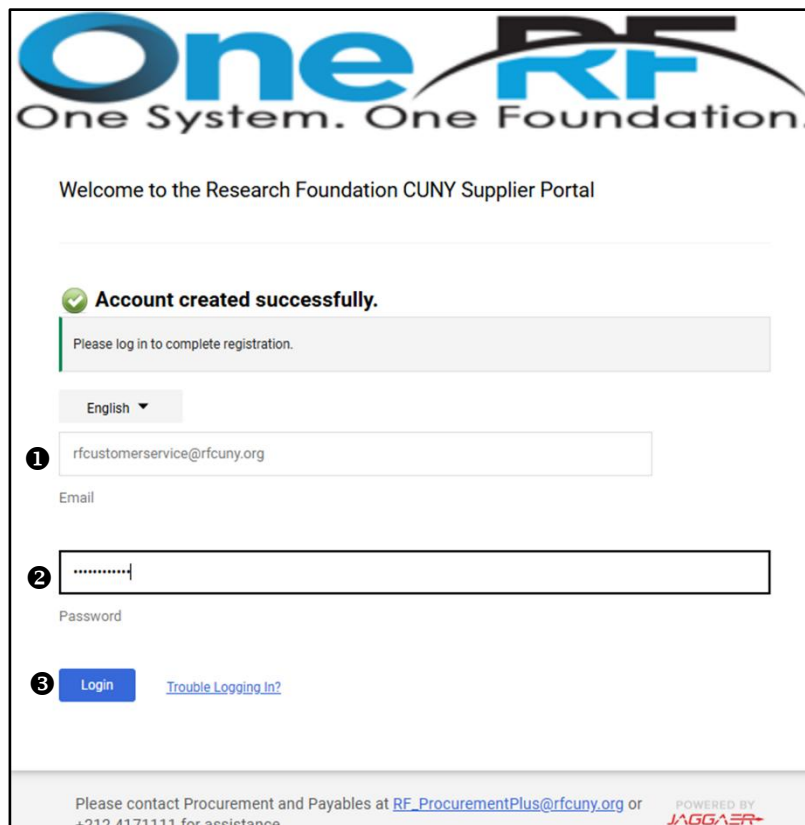


Figure 5

6. After logging in, the **Welcome to Supplier Registration** screen **1** will appear, in **Figure 6, below**. Read the screen and then **Click on Save Changes 2**, then **Next 3**, and the **Company Overview** screen will appear as shown in **Figure 7, on Page 5**. The **Company Overview** screen is where you will start the registration process.

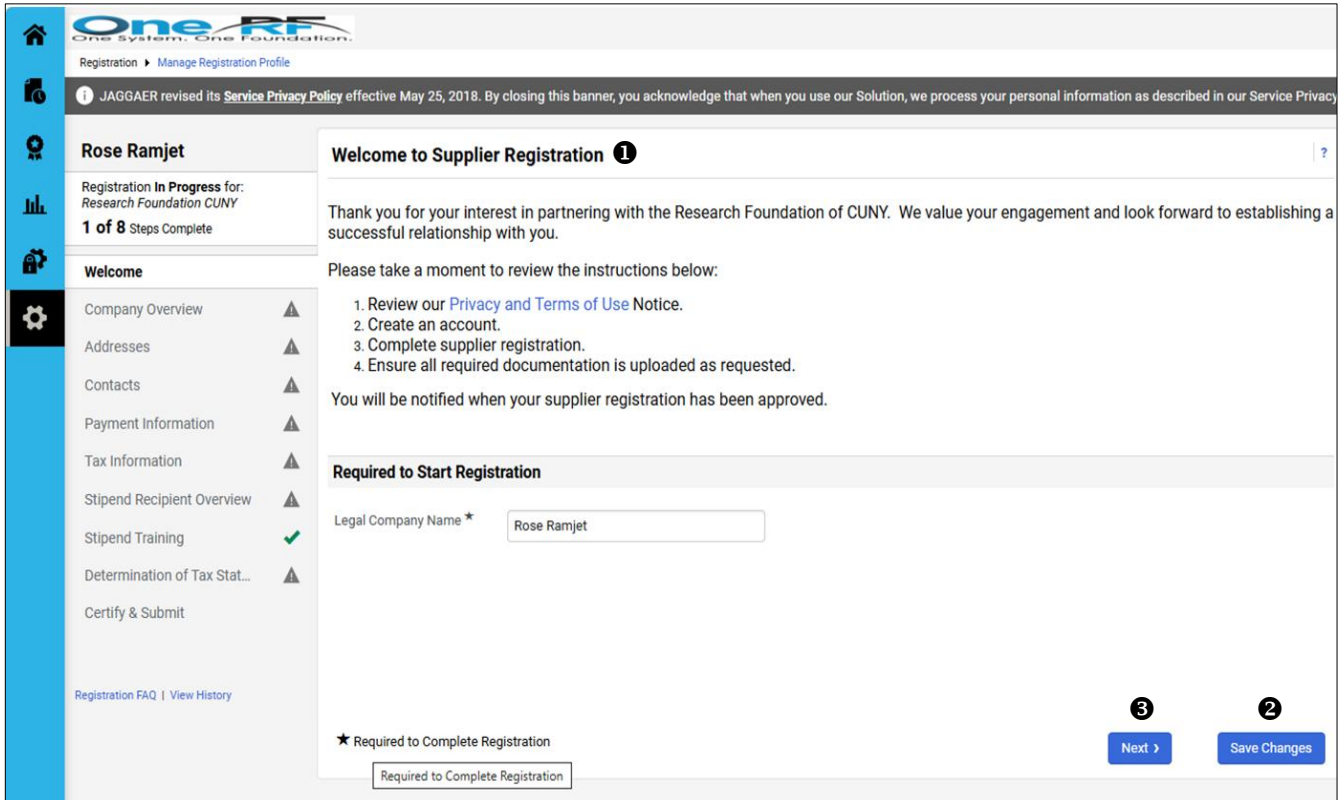


Figure 6

7. After clicking on **Next** ⑥, in **Figure 6**, on **Page 5**, the **Company Overview** screen will appear as shown in **Figure 7**, below.

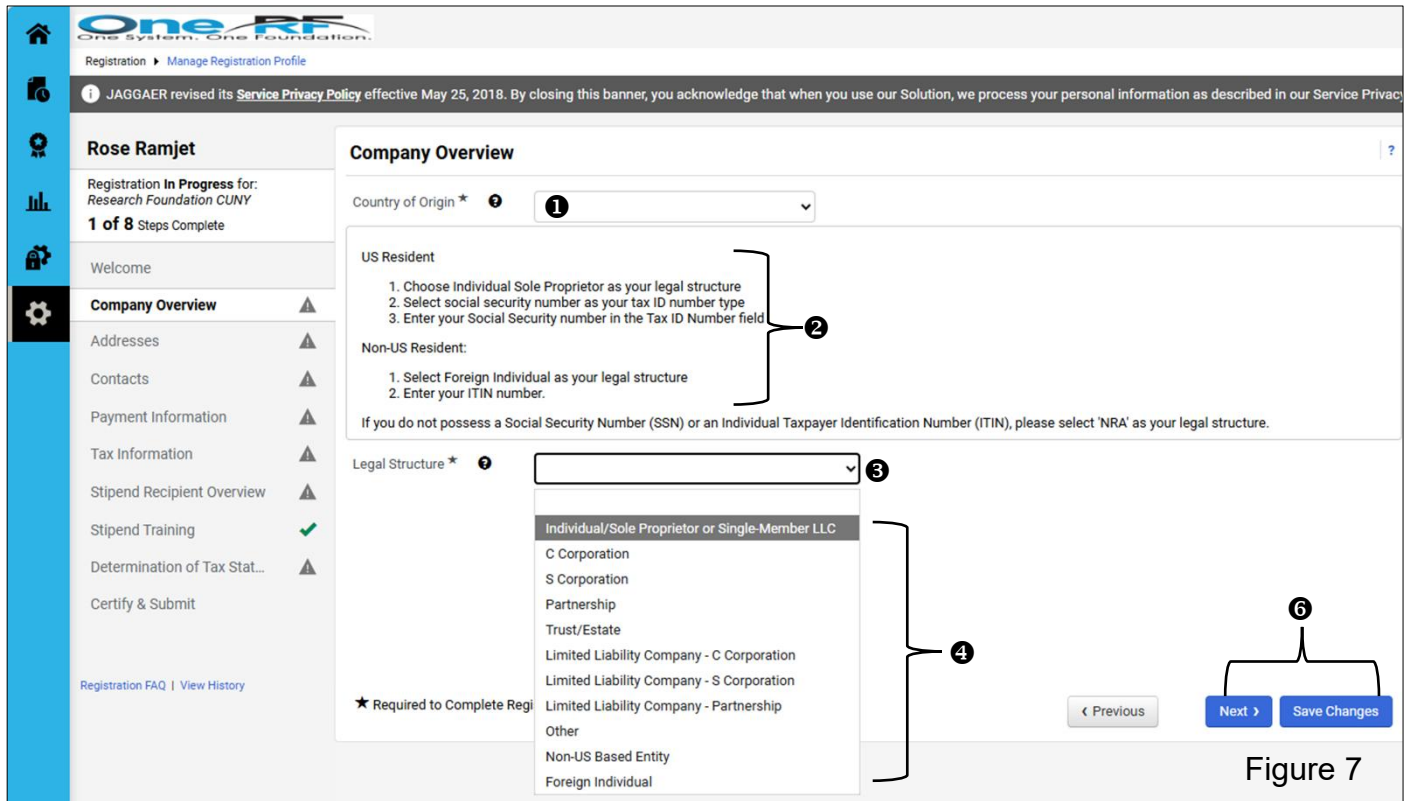


Figure 7

- ① **Country of Origin:** Click on the drop-down menu and select your country.
- ② Read the instructions regarding whether you are a **US resident** or a **Non-US resident**.
- ③ **Legal Structure Drop-Down Menu:** Follow the instructions if you are a **US resident** or a **Non-US resident** in ②.
- ④ In the example, the student is a US resident, and we will choose **Individual/Sole Proprietor or Single Member LLC**.
- ⑤ After choosing Individual/Sole Proprietor or Single Member LLC, a **Tax Id Number Type** box will appear under the Legal Structure box, as shown below. **Click the drop-down menu ①** and select **Employer Identification Number ②**. In our example, because the student is a U.S. resident, click the **Social Security number**.



- ⑥ **Save Changes and Next:** Click **Save Changes**, then **Next** to move to the next step, **Contacts**.

8. After completing **Company Overview** and clicking **Next ⑥**, in **Figure 7**, on **Page 6**, the **Addresses** screen will appear as shown in **Figure 8**, below. You will need to complete a Physical ① and Remittance ② addresses. Click **Add Address ③** to enter the addresses.

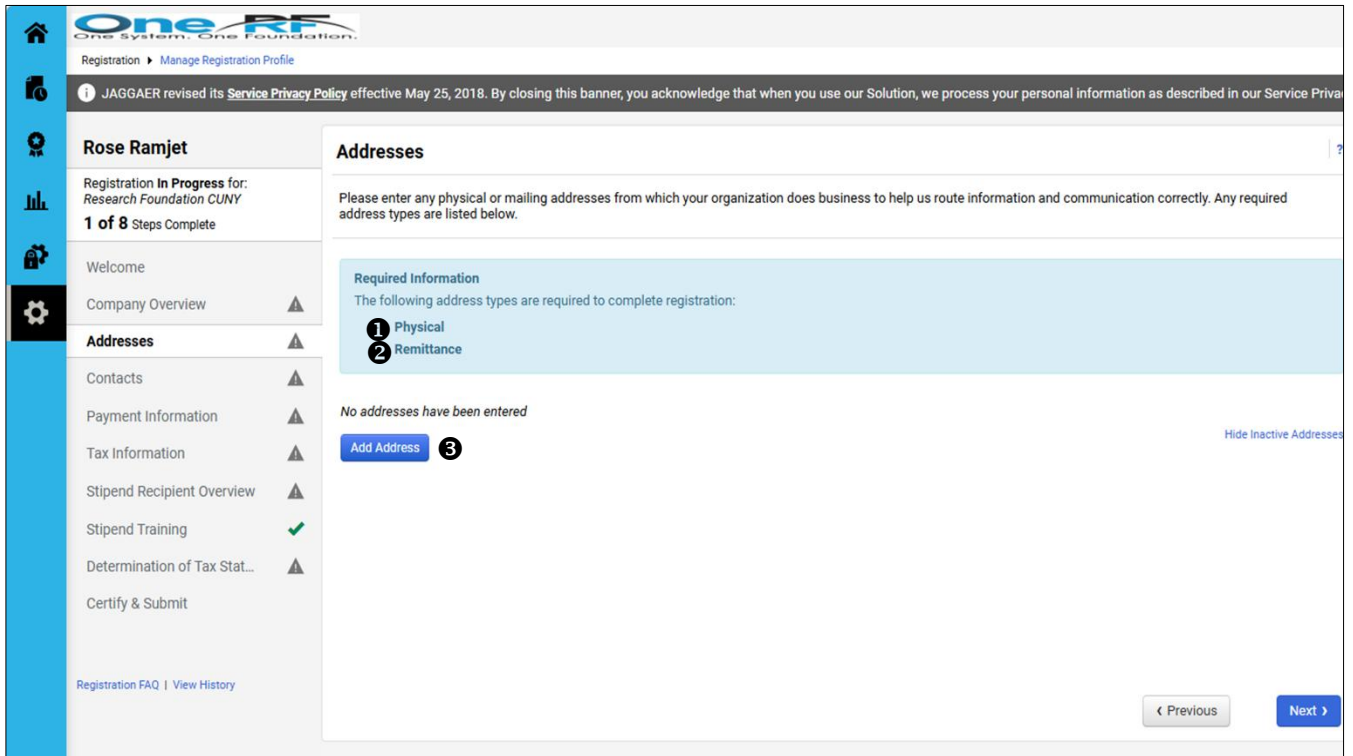


Figure 8

9. After clicking **Add Addresses** ③ in **Figure 8, on Page 7**, the **Add Addresses** screen will appear as shown in **Figure 9** below. Fill in **What would you like label this address?** ①. We chose **My Home**. The **Receive Payment (remittance)** box ② and **Other (physical)** box ② is also checked off because the same address will be used for Remittance and Physical. Now click **Next** ③. Another Add Address box will appear as shown in **Figure 10** below. Complete the required information as shown, then click **Next** ①.

Figure 9

Figure 10

After clicking **Next** ❶ in **Figure 10**, on **Page 8**, a **Primary Contact for This Address** screen will appear as shown in **Figure 11** below. Type in the name of the label, which was **My Home** in **Contact Label** ❶ (see **Figure 9** on **Page 8**, **What would you like label this address?** ❶). Then, fill in the **First Name** ❷. After entering the first name, the other fields will auto-populate. Now click **Save Changes** ❸. A success message will appear, and you will be taken to the **Contacts** screen, as shown in **Figure 12** on **Page 10**.

The screenshot shows a web form titled "Add Address" with a close button (x) in the top right corner. Below the title is a sub-header "Primary Contact For This Address (Step 3 of 3)" with a help icon (?). A light blue banner below the sub-header reads "You can also update and add Contacts later from the Contacts page." There are two radio buttons: "Enter New Contact" (selected) and "Not Applicable". The form contains several input fields: "Contact Label" with "My Home" (marked ❶), "First Name" with "Rose" (marked ❷), "Last Name" with "Ramjet", "Position Title" with "Student", "Email" with "rfcustomerservice@rfcuny.org", "Phone" with "2015555555" and an "ext." field (marked ❸), "Toll Free Phone" with an "ext." field, and "Fax". Below the phone fields is the text "International phone numbers must begin with +". At the bottom left, there is a note "\* Required to Complete Registration". At the bottom right, there are two buttons: "Previous" and "Save Changes".

Figure 11

After clicking **Save Changes** ③ in **Figure 11**, on **Page 9**, the **Contacts** screen will appear as shown in **Figure 12** below. If you want to add more contacts, click **Add Contact** ① and follow the steps you did earlier; otherwise, click **Next** ②. This will move you to the Payment Information screen as shown in **Figure 13** below.

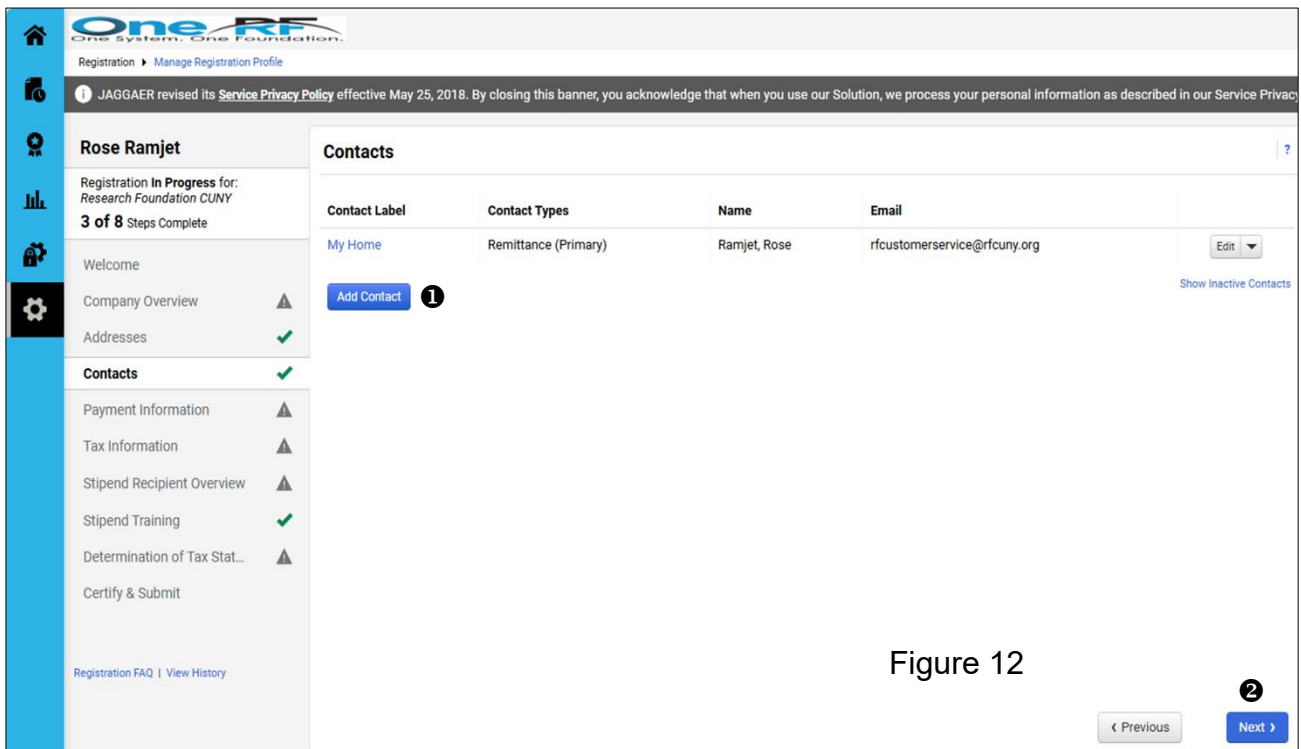


Figure 12

10. After clicking **Next** in **Figure 12**, above, the **Payment Information** screen will appear as shown below. Read the screen thoroughly. Especially what is highlighted. Click **Add Payment Information** drop-down menu ① and choose your option ②.

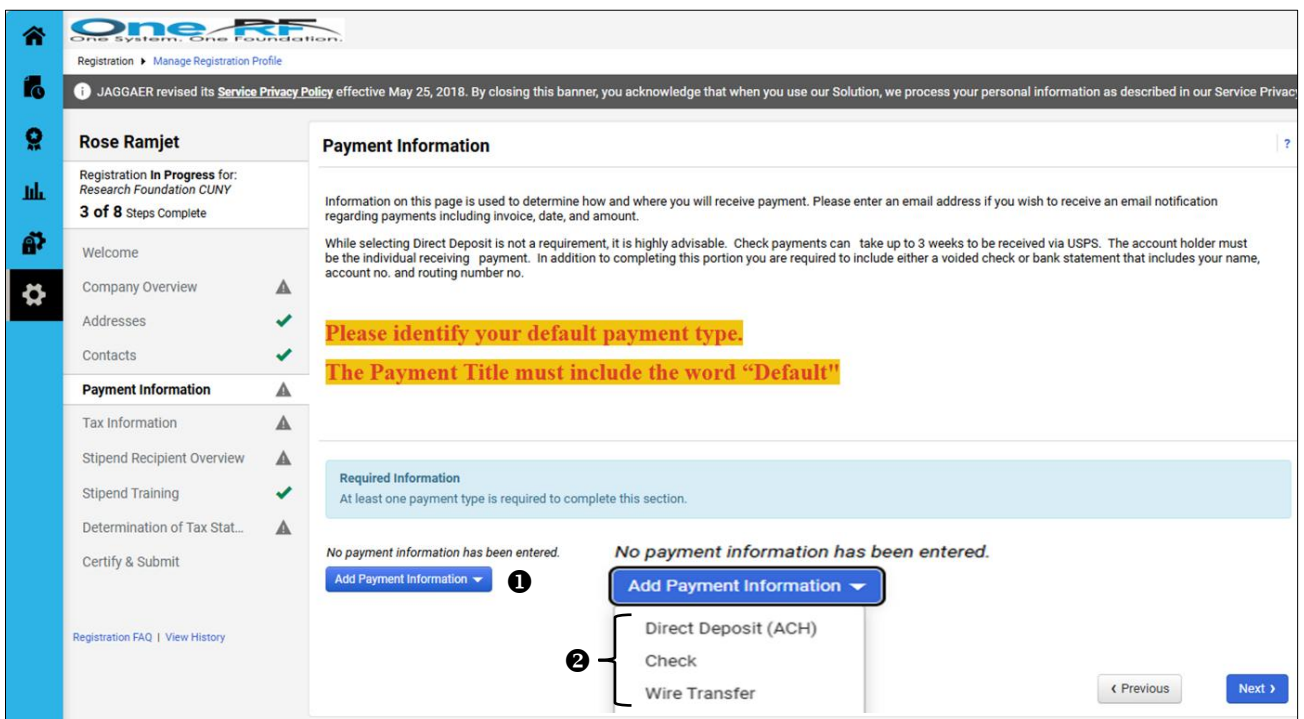


Figure 13

If you clicked **Check** in **Figure 13, Page 10, Figure 14** will appear as shown below. **Payment Title ①** : When you click in the title box, type in **Default**. **Country ②**: choose from the drop-down menu. **Remittance Address ③**: choose from the drop – down menu. **Currency ④**: select **USD**. **Active ⑤**: click **Yes**. Click **Save Changes ⑥**.

The screenshot shows a modal window titled "Add Payment Information" with a close button (X) in the top right corner. Below the title is a light blue banner with the text "Only associated countries are displayed." The form contains the following fields and controls:

- Payment Title \*** ①: A text input field.
- Country \*** ②: A dropdown menu.
- Payment Type \***: A dropdown menu with "Check" selected.
- Remittance Address \*** ③: A dropdown menu.
- Currency \*** ④: A dropdown menu.
- Active ⑤**: Radio buttons for "Yes" (selected) and "No".

At the bottom left, there is a note: "★ Required to Complete Registration". At the bottom right, there are two buttons: "Save Changes" (labeled ⑥) and "Close".

Figure 14

If you click **Direct Deposit**, **Figure 15** will appear as shown below. Complete the top section as outlined in **Figure 14, Page 11**. Remember, the **Payment Title** you must enter **Default**. In the **Bank Account Section ①**. Fill in **Country ②**: choose from the drop-down menu. **Bank Name ③**: type in your bank name. **Account Holder's Name ④**: type in the name exactly how it appears on the bank account. **Account Type ⑤**: from the drop-down menu, choose **Checking** or **Savings** and select the one you prefer. **Account Number Type ⑥**: from the drop-down menu, choose **Account Number** or **IBAN**. **Routing/Transfer Number ⑦**: enter the bank routing number. **Account Number ⑧**: enter bank account number from your **checking** or **savings** account. Confirm **Account Number ⑨**: re-enter the bank account number. Click **Save Changes ⑩**.

Remember, the Payment Title you must enter **Default**

Figure 15

After clicking **Save Changes** ⑩ in **Figure 15** on **Page 12**, the **Payment Information** screen will refresh and display the correct information, as shown in **Figure 16** below. Click **Next** ⑪ to move to **Tax Information**.

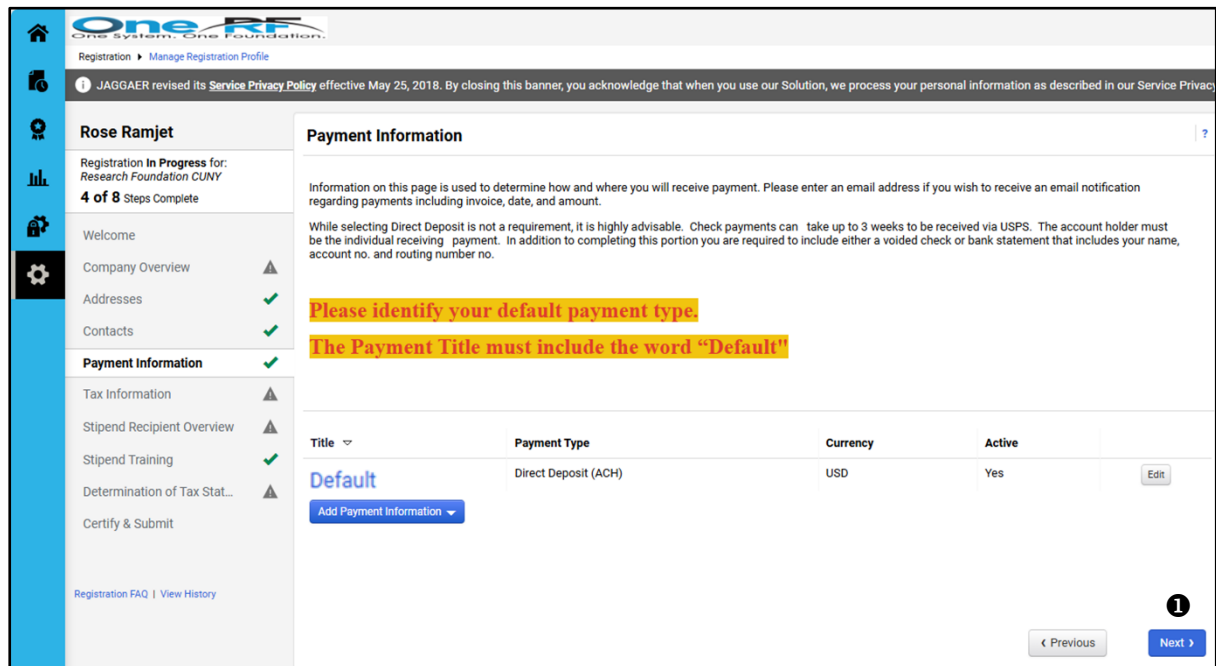


Figure 16

11. After clicking **Next**, ⑪ in **Figure 16** above. The **Tax Information** screen will appear as shown below. Click on **Add Tax Document** ⑫, and a drop-down menu with **W9** will appear, and click the W9.

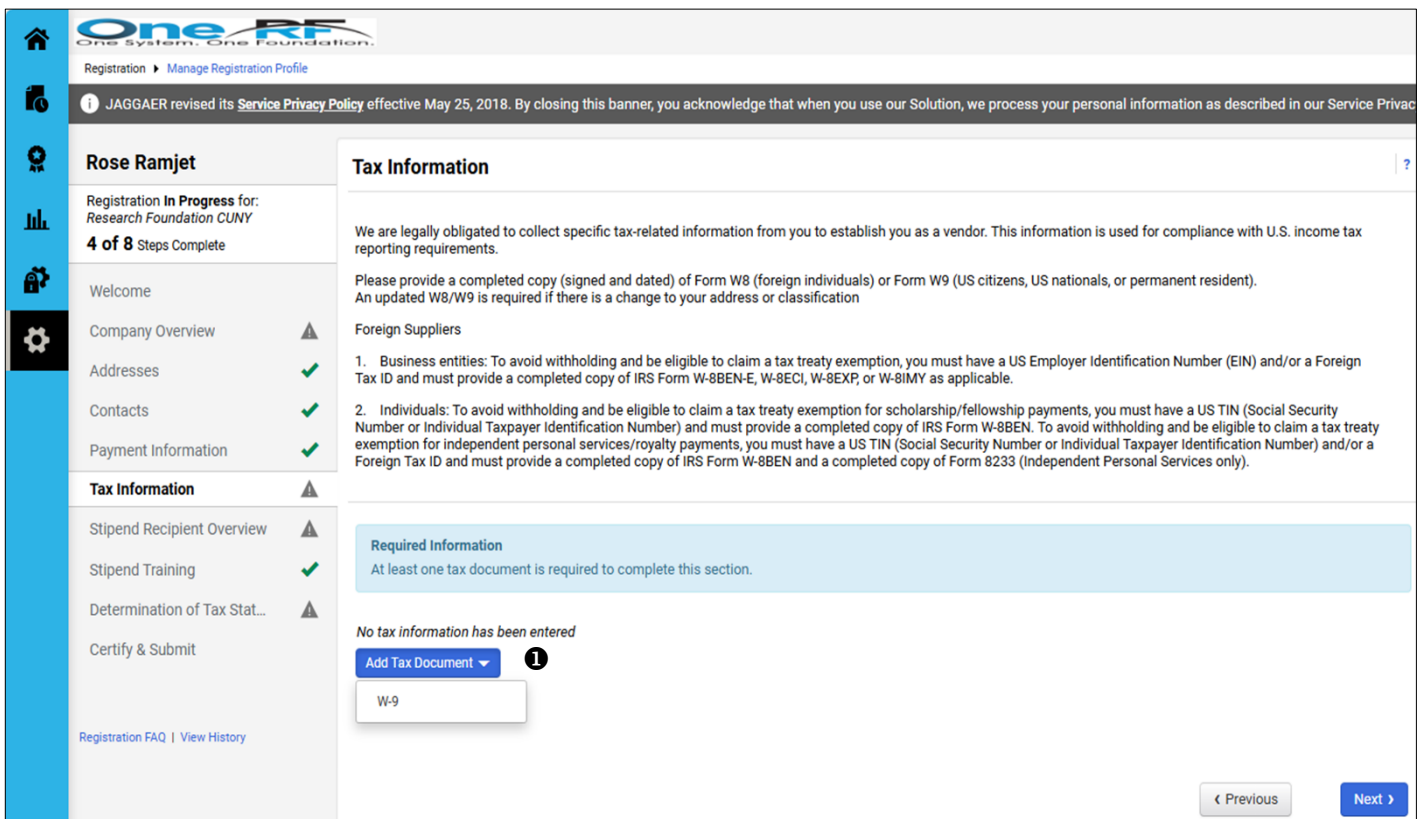


Figure 17

After clicking on **W9** in **Figure 17**, on **Page 13**, the **Add Tax Document** will appear as shown in **Figure 18** below. **Tax Document ①**: type in the name you are calling your tax document. **Tax Document Year ②**: from the drop-down menu, select the correct year of your W-9 tax document. **Tax Documentation ③**: attach your W-9 by clicking on the **Download Hyperlink ④**. Click **Save Changes ⑤**.

Figure 18

After clicking **Save Changes ⑤** in **Figure 18** above, the **Tax Information** screen will refresh and display the correct information, as shown in **Figure 19** below. Click **Next ①** to move to **Stipend Recipient Overview**.

Figure 19

12. After clicking **Next** ❶ in **Figure 19**, on **Page 14**, the **Stipend Recipient Overview** screen will appear as shown in **Figure 20**, below. Complete all the fields and click **Save Changes** ❷, then click **Next** ❸.

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**Rose Ramjet**

Registration In Progress for:  
*Research Foundation CUNY*  
**5 of 8** Steps Complete

Welcome

- Company Overview ▲
- Addresses ✓
- Contacts ✓
- Payment Information ✓
- Tax Information ✓
- Stipend Recipient Overview** ▲
- Stipend Training ✓
- Determination of Tax Stat... ▲
- Certify & Submit

Registration FAQ | View History

### Stipend Recipient Overview

First Name \*

Last Name \*

Email Address \*

Address Line 1

Address Line 2

City

State

Zip

Telephone Number

Cell Number

★ Required to Complete Registration

◀ Previous    **Next** ▶ (❷)    **Save Changes** (❶)

Figure 20

13. After clicking **Next** ② in **Figure 20**, on **Page 15**, the **Stipend Training** screen will appear as shown in **Figure 21** below. If you choose **CUNY Student** or **Non-CUNY Student**, a second set of questions will appear where you need to choose your degree program. Once you answer the required questions, click **Save Changes** ①, then click **Next** ②.

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**Rose Ramjet**

Registration In Progress for:  
*Research Foundation CUNY*  
6 of 8 Steps Complete

Welcome

Company Overview ⚠

Addresses ✓

Contacts ✓

Payment Information ✓

Tax Information ✓

Stipend Recipient Overview ✓

**Stipend Training** ✓

Determination of Tax Stat... ⚠

Certify & Submit

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

### Stipend Training

Are you a student or Post-Doctoral Trainee? (comment: One of the items below must be selected)

CUNY Student  
 Non CUNY Student  
 Post-Doctoral Trainee  
 Not a Student/Post Doctoral Trainee

If you are a student, what is your degree program? (comment: One of the items below must be selected)

Undergrad  
 Masters  
 Phd  
 High School  
 Middle School

Other

★ Required to Complete Registration

[← Previous](#) [Next →](#) [Save Changes](#)

Figure 21

14. After clicking **Next** ② in **Figure 21**, on **Page 16**, the **Determination of Tax Status** screen will appear as shown in **Figure 22**, below. We selected the **United States** as the country of origin in **Figure 7**, on **Page 6**, of the **Company Overview** screen, which, in the **Determination of Tax Status** screen, defaulted to **Yes** in question one. Now, enter your **Social Security Number** ②. Then click **Save Changes** ③ and then **Next** ④. If you click no for question one, **Figure 23** will appear, and you will need to complete a different set of questions.

Figure 22

If question one ① is **No**. Select the proper **Status** that applies to you ②. Attach the required documentation for your status by clicking **Select File** ③. Click on **Sign Document** ④. This will open a new tab with the DocuSign document. Follow the instructions in DocuSign, complete the document, and attach any required files. Once you have finished the DocuSign process, go back to the **Determination of Tax Status** page. Click **Save Changes** ⑤, then click **Next** ⑥.

Figure 23

15. After clicking **Next** ① in **Figure 22** or **23** on **Page 17**, the **Certify and Submit** screen will appear it will be auto-populated as shown in **Figure 24** below. Review and **check** the **I certified that all information provided is true and accurate** box ①, and then click **Submit** ②.

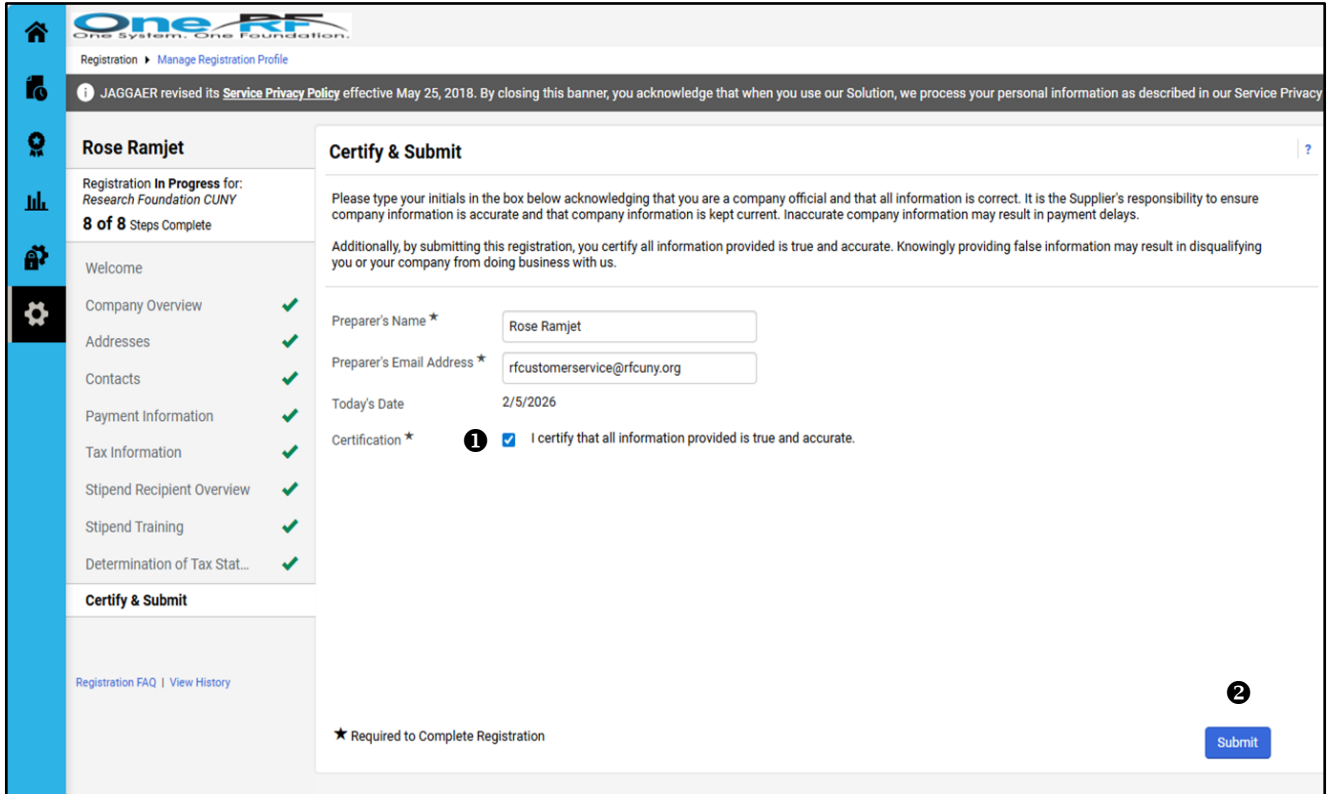


Figure 24

16. After clicking on **Submit** ② in **Figure 24**, above, you will receive the following message, as shown in **Figure 25** below.

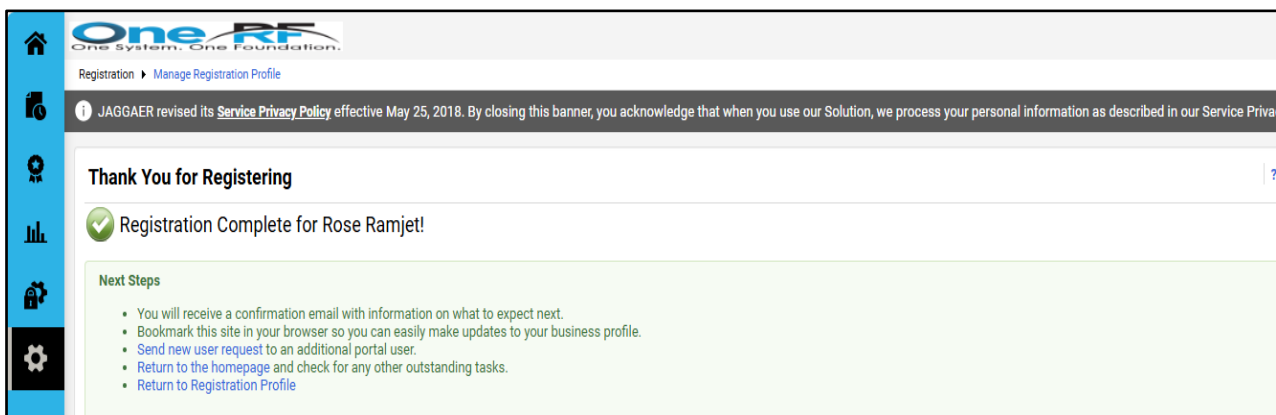


Figure 25