W-9 / W-8BEN / W-8BEN-E Submission Instructions
Quick Reference Guide

This guide offers an overview of the W-9 / W-8BEN / W-8BEN-E submission process for a vendor, as well as for a Mines employee submitting forms on behalf of a vendor.

Overview & Purpose of W-9 / W-8 Submission Process

W-9 and/or W-8 information is required in order to establish a vendor. Individuals and vendors are able to securely submit W-9 and W-8 information to Colorado School of Mines via the secure OnBase system.

The submission form allows a vendor to provide business information as reported to the IRS, ACH information/supplemental documentation for domestic vendors, and wire information/supplemental documentation for international vendors.

If a Mines employee has a vendor’s IRS W-9 form or W-8 form, the employee may use the submission link specific for a Mines affiliate to submit the form on behalf of the vendor.

Instructions for Submission

Individuals and domestic vendors should use the W-9 submission link.

International individuals should use the W-8BEN link.

International entities (not individuals) should use the W-8BEN-E link.

For more information on the form W-9, W-8BEN, or W-8BEN-E visit IRS.gov:

Based on the appropriate submission link, form may include the following sections:

In the submission form, all fields marked with a red asterisk are required for submission.

Vendor Information
Enter basic business information in each field.

W-9 Submission
A vendor can attach their completed IRS W-9 form (linked above). If the vendor does not have
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W-9 Submission:
an IRS W-9 form to attach, Mines can accept a vendor’s submission as a substitute W-9, provided all required fields on the submission are complete.

**Note:** *If a Mines employee is submitting an IRS W-9 form on behalf of a vendor or individual, the Mines employee must attach the vendor’s IRS W-9 in order to complete submission. Mines employees must use the link specific for Mines employees to submit on behalf of a vendor.*

W-8BEN / W-8BEN-E Submission:
A completed IRS W-8BEN or W-8BEN-E (linked above) must be attached in order to submit the form.

**Note:** *If a Mines employee is submitting a W-8BEN or W-8BEN-E on behalf of a vendor, the same submission link can be used.*

Colorado School of Mines Department Information
Vendors must enter the name and email address of the Mines employee they are currently working with. When a vendor submission is received, this contact information allows us to notify the Mines employee when processing is complete.

**Note:** *If a Mines employee is submitting an IRS form on behalf of a vendor, they must enter their name and email address. This contact information allows us to notify the Mines employee when processing is complete.*

Federal Tax Classification
Select appropriate federal tax classification from the drop down. If it is not a choice in the drop down, select the “Other” option and you’ll be prompted to specify more details.

Business Type/Classification/Services
Select appropriate options based upon tax classification and business registration information with the Colorado Office of Economic Development Minority Business Directory.

Vendors will also have the opportunity here to identify business services provided. Mines will notify vendors whenever a solicitation is posted that may match the goods and categories / services provided.

*Please note all Mines solicitations are posted on the Rocky Mountain E-Purchasing System: https://www.bidnetdirect.com/colorado/.*

*Becoming a vendor with Colorado School of Mines does not mean a business is automatically registered with the Rocky Mountain E-Purchasing System. We recommend vendors register there separately to be alerted to all relevant governmental solicitations.*

Payment Plus (only available to domestic vendors)
Vendors interested in CSM Payment Plus option may specify so here and would be contacted with more
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information on the program. In order to enroll, a vendor must accept credit cards. This program allows Mines to pay vendors with automated Visa card payments, called Payment Plus.

**ACH (only available to domestic vendors)**
Vendors who elect to receive payment via ACH can specify so here and must include account details. Mines require supplemental documentation in order to establish ACH, such as a Bank Verification Letter, voided business check, or bank statement listing account details. Multiple supplementals may be uploaded here.

**Wire Information (International Vendors)**
Mines pays international vendors by wire when invoiced. Providing wire verifications in this section will make payments more efficient. To provide wire verifications with a W-8 submission, attach a Bank Verification Letter, or Bank Statement showing wire details. Vendors may also choose to attach wire details on letterhead.

**SAM.gov Registered Universal ID #**
Vendors registered with the System for Award Management (SAM) to do business with the U.S. government may enter their DUNS #.

For additional information, visit [https://sam.gov/SAM/](https://sam.gov/SAM/)

**Colorado PERA Information**
Please select the appropriate option based on PERA retiree status.

**Digital Signature**
In order to finalize form submission, check the certification box. The individual submitting the form is required to list their name and date of submission.