

## **Tipalti Account Registration Guide**

**DISCLAIMER:** This document is for informational purposes only, and should not be considered tax, financial, or legal advice. Consult a tax advisor to discuss your specific situation and tax obligations.

To create your Tipalti account (Parker Dewey's payment platform), read your "Invitation to Parker Dewey's Payment Portal" email from Parker Dewey. This email includes a unique registration link and a <u>registration</u> <u>tutorial video</u>. Creating an account is only possible using the unique registration link in this email.

Tipalti is a secure system, and signing up only needs to be done once. **Ensure you complete all steps. Failure to complete all steps will result in no payment being disbursed.** Remember your email address and password for future reference. <u>Once you've created a Tipalti account, you can log in here</u>.

**IMPORTANT:** It takes 5 minutes to create a Tipalti account. When creating a Tipalti account, note:

- 1. Signing up only needs to be done once. If you already have an account, no action is required.
- 2. Input your legal first name and last name when creating the account and filling out Form W-9.
- 3. You can choose between 2 payment options that are at no-cost to you: a Direct Deposit/ACH payment to your preferred bank account (for U.S. bank accounts only) or by a mailed check. For a small fee, you can choose to receive your payment via a PayPal deposit. If you input incorrect bank account information, the payment attempt will fail and you will be charged \$20 for a 2nd attempt.
- 4. FORM W-9: You must complete a tax form within Tipalti select Form W-9. On this form:
  - **a.** Fill out the required fields: your legal first and last name; type of organization; mailing address; TIN (SSN, ITIN, or EIN); signature; and email.
  - b. If using a SSN or ITIN: Put your name in the "Name" field. Check the Individual/Sole Proprietor option from the "Type of Organization" list. In the "Social Security Number" field, input your SSN or ITIN. Inputting an ITIN in a SSN field is allowable per <u>the form's instructions</u> (page 4).
  - c. If using an EIN: Put your name in the "Name" field and your business name in the "Business Name" field. Select the proper "Type of Organization" option that corresponds to your business structure. If your business is a single owner LLC, check the Individual/Sole Proprietor option as it is considered a disregarded entity read more about <u>disregarded</u> entities on the form's instructions (page 3). Then, input your EIN in the EIN field.
  - **d.** For <u>tax purposes only</u>, you are considered a U.S. resident alien if you meet the <u>IRS' Substantial</u> <u>Presence Test</u>. A U.S. resident alien is considered a U.S. person or individual (but not a citizen) for tax purposes only.
- 5. If you have questions, please email <u>support@parkerdewey.com</u>.

Tax Disclaimer: All compensation from Parker Dewey is taxable income and should be reported as selfemployment income on your tax return. TheDream.US recommends that Scholars save 30-35% of this compensation to pay taxes come tax season. If you earned more than \$600 from Parker Dewey during the year, Parker Dewey will send you a completed Form 1099 between February-March of next year for you to report on your tax return. Please consult a tax advisor to discuss your specific situation and tax obligations. Review TheDream.US' Tax Matters FAQs handout on our ITIN webpage for more information. The IRS has additional guidance on managing taxes for your gig work.

IMPORTANT: Review the following pages for step-by-step account set-up instructions and screenshots. Specifically review Step 7 (pages 5 & 6) to fill out the electronic tax form correctly! **<u>STEP 1:</u>** Click on the unique registration link from your invitation email from Parker Dewey. Fill out the fields to create an account. Remember your email address and password so you can access your account in the future!

tipalti	Get paid easily with Tipalti's Supplier Hub	🕑 English ~
	Email address	
	Password	
	Confirm password	
A A A A A A A A A A A A A A A A A A A	Security question	
	What is your pet's name?	
	Security answer	
Do you pay suppliers for your business? We may be able to help		
	Register	

**STEP 2:** After registering for an account, click "Click Here" to log in.



**STEP 3:** Enter your email address and password to log into your Tipalti account.

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	Email address	
	Peasawird  Forgot password?  Log in  Priggot in Light to Bright generated consets to the use of my information in accordance with Tpah's Inview Printip	
	Want to pay your suppliers more efficiently? We can help! Discover how >	

**<u>STEP 4</u>:** To increase your account security, complete the 2-step verification fields. Select the United States and enter your cell phone number. After you complete the fields, you will get a text message from Parker Dewey with a code. Enter that code online to complete the verification process.



### STEP 5: Address Section

**If using a SSN or ITIN:** Select "Individual" as Type. Enter your personal information, including phone number, legal first and last name, and mailing address (a P.O. Box is not allowed). Ensure all information is correct and your name is the same as it appears on your bank statements. (Mis-matched names can lead to rejection of payment.)

**If using an EIN:** Select "Company" as Type. Enter your personal information, including phone number, legal first and last name, company name, and mailing address (a P.O. Box is not allowed). Ensure all information is correct and that your name and business name is the same as it appears on your business's bank statements. (Mis-matched names can lead to rejection of payment.)

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Payment History	Address Payment Method Tax Forms Done	
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🕈 Discover Tipalti 🗅	Type O Individual O Company	
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	Address 2	
	City	
	Country Select country ~	
	ZIP	
	Next	

**STEP 6: Payment Method Section** Next, fill out the Payment Method information. Select the Payment Method (either Direct Deposit/ACH, mailed check, or PayPal). No transaction fees are associated with Direct Deposit or mailed check. For PayPal, there is a transaction fee of 2% of the amount + \$1. Also review <u>Tipalti's Terms of Service</u> and <u>Tipalti's Privacy Policy</u>, and then check the box at the bottom.

**IMPORTANT:** Ensure you input your correct bank account information. If you input incorrect bank account information, the payment attempt will fail and you will be charged \$20 for a 2nd payment attempt.

Payment Method Option #1 Screenshot - Direct Deposit/ACH (no transaction fee):

tipalti   Supplier Hu	b	
오르 Payment Details	<ul><li><b>⊘</b></li></ul>	(4)
Payment History	Address Payment Meth	od Tax Forms Done Direct Deposit / ACH
€ Discover Tipalti	Name on Account <b>0</b> Bank Name Routing Code <b>0</b>	
	Account Number Account Type No transaction fees.	Checking     Savings
	Back	Next

Payment Method Option #2 Screenshot – Mailed Check (no transaction fee):

tipalti   Supplier Hul	b		
오크 Payment Details	<ul><li><b>⊘</b></li></ul>	(4)	
Payment History	Address Payment Meth	od Tax Forms Done	
-	Payment Method:	Check	
€ Discover Tipalti	Checks are sent by post to the ac Checks are for deposit only, and The checks' currency will be as d	ddress below. Please allow 15 business days for the check to arrive. cannot be transferred. Isplayed above.	
	Currency	USD	
	Name on Check		
	Address to Send Check	123 Somewhere Street, Phoenix, 8	
	No transaction fees.		
	See <u>Tipalti's Terms of Service and Priv</u>	acv Policy	
	Back		Next

Payment Method Option #3 Screenshot – PayPal (small transaction fee):

tipalti   Supplier Hub			
오르 Payment Details	<ul> <li>2</li> </ul>	3(	4
Payment History	Address Payment Method	Tax Forms D	lone
	Payment Method:	PayPal	
	Fees listed at <u>www.paypal.com</u> may apply.		
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	Email Address		
	Please enter your first and last name	as they appear on your PayPal acc	ount under the 'Profile' menu:
	First Name		
	Last Name		
	Transaction fees: 2% of the amount + USD FX fees: <u>View tiers</u> .	1.00, maximum USD 1.00.	
	I agree to the Terms of Service a	nd Tipalti's Privacy Policy,	
	Back		Next

**STEP 7: Tax Forms Section** Complete the electronic Tax Forms section. **Select Form W-9**. Know that for tax purposes only, you are considered a U.S. resident alien if you meet the IRS' Substantial Presence Test. A U.S. resident alien is considered a U.S. person/individual (but not a citizen) for tax purposes only.

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	O Other Complete Form		
	Back		
	These forms are provided solely for your convenience and are not intended to provide you with tax advice. You should consult with a qualified to	tax adviser or attr	orney to receive

**IMPORTANT:** See screenshot of the electronic Form W-9 on the next page. On this form:

- 1. Fill out the required fields: your legal first and last name; type of organization; mailing address; TIN (SSN, ITIN, or EIN); signature; and email.
  - If using a SSN or ITIN: Put your name in the "Name" field. Check the Individual/Sole Proprietor option from the "Type of Organization" list. In the "Social Security Number" field, input your SSN or ITIN. Inputting an ITIN in the SSN field is allowable per <u>the form's</u> instructions (page 4).
  - If using an EIN: Put your name in the "Name" field and your business name in the "Business Name" field. Select the appropriate option from the "Type of Organization" list that corresponds to your business structure. If your business is a single owner LLC, check the Individual/Sole Proprietor option as it is considered a disregarded entity read more about disregarded entities on the form's instructions (page 3). Then, input your EIN in the EIN field.
  - **IMPORTANT:** Ensure the name you enter matches the name you entered in the Address Section. If the names do not match, you will receive an error.
- For tax purposes only, you are considered a U.S. resident alien if you meet the <u>IRS' Substantial</u> <u>Presence Test</u>. A U.S. resident alien is considered a U.S. person or individual (but not a citizen) for tax purposes only.

**STEP 8: Done Section** Once you fill out the electronic Form W9, you are all set! Ensure you complete all steps and see a similar screen as seen below. No confirmation email will be sent. You must complete all 4 steps to receive payment. If you don't complete these steps, you will not receive payment. Note: If you input an incorrect TIN, you will receive an email that your TIN has failed validation and will need to log back in and edit your tax form before payment can be disbursed.



For reference, you can view your Payment History in the Payment History Tab on the lefthand menu. In time, the status of your payment will be listed there. Parker Dewey manually adds payment into the system so timing will vary.

Substitute Form	Request for Taxpayer Identi Certificati	fication Numbe on	er and	Rev. March 2024
Name ( <u>individual or co</u>	ompany name as shown on your income t	ax return) 🚯		
			Required field	
Business Name/Disre	garded Entity Name (if different from ab	ove)		
			Exemptions (co	des apply only to
Check appropriate box	X: proprietor		certain entities,	not individuals):
O C Corporation	s opnetor		Exempt payee	code (if any)
O S Corporation				· · · · ·
O Trust/estate			Exemption from code (if any)	n FAICA reporting
O Limited liability	company. Enter the tax classification: 🏲			~
Note: Check the "LLC" box a is a disregarded entity. A disr classification of its owner.	above and enter the appropriate tax classification of t regarded entity should instead check the appropriate	he LLC, unless it box for the tax	(Applies to acco outside the U.S.	ounts maintained )
O Other (Only list	entity type not listed above) (see instruct	ions) 🕨		
Please select type of organ	nization			
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#### Tipalti's Electronic Form W-9:

A screenshot of Tipalti's electronic Form W-9 is shown here. Below are helpful links:

About Form W-9 Form W-9 Instructions

#### If using a SSN or ITIN:

-Put your name in the "Name" field -Check "Individual/Sole Proprietor" box from Type of Organization list -Input SSN or ITIN in SSN field -Complete all other required fields

# If using an EIN <u>AND</u> your business is a sole proprietor or LLC:

-Put your name in the "Name" field -Put your Business Name in the "Business Name" field -Check "Individual/Sole Proprietor" box from Type of Organization list -Input EIN in EIN field -Complete all other required fields -What's a <u>disregarded entity</u>? Read page 3 of form's instructions

<<< Remember – if you do not have a SSN, you can input an ITIN in the SSN field. Inputting an ITIN in a SSN field is allowable per <u>the form's</u> instructions (page 4).

<<< For tax purposes only, you are considered a U.S. resident alien if you meet the <u>IRS' Substantial</u> <u>Presence Test</u>. A U.S. resident alien is considered a U.S. person or individual (but not a citizen) for tax purposes only.