

# Completing the Tax Information Section

The Tax Information section of a requisition must be completed when placing an order for services in BUY.IU. Information entered in this section is used by University Tax Services to calculate tax liability, adjust payments due to this liability, gross up payments per request, and report contractor earnings to some US states.

**This information is required when establishing orders for services.**  
If left incomplete, the requisition will be returned to the submitter.

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## Orders Placed with Domestic Suppliers

The Tax Information section is in the left-hand menu of the requisition. Click **edit** in the upper right-hand corner to make changes.

[Return to shopping cart](#)

This order is ready to be placed.

Place Order Assign Cart

**Requisitions: 3142291**  
Breakfast for Visiting Alumni

Status: **Draft**  
Document Total: **500.00 USD**  
[What's next for my order?](#)

Requisitions <

- General ✔
- Shipping ✔
- Billing ✔
- Accounting Codes ✔
- Internal Notes and Attachm... ✔
- External Notes and Attach... ✔
- Integration ✔
- Special Payment Instructions ✔
- Recurring Payments ✔
- Tax Information** ✔
- Compliance ✔

### Tax Information [Document Actions](#) | [History](#) | [Print](#) | [?](#)

Gross Up?	Services Provided (in what Country)	Location State
no value	USA	IN

edit

▼ **Lines** [Selected Line Item Actions](#) ▼

**Panera Bread Company**  
[more info...](#)  
Mishawaka, IN  
4310 N. Main St, attn: abbie.bossom@panerabread.com, Mishawaka, IN 46545 US

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	
1 Bagels for dayyssss <a href="#">more info...</a>		DZ	10.00	50 DZ	500.00 USD	<input type="checkbox"/>
					<a href="#">Add discount...</a>	

Tax Information (same as header)

<b>Supplier subtotal</b>	500.00
<b>Supplier total</b>	500.00

Leave the Gross Up? field blank when working with domestic suppliers. Complete the Services Provided (in what Country) field by clicking **Select from all values...**

A new window opens. This new window has two fields which should reflect where services are being performed. If services are being performed online, enter the country where the supplier is physically located when performing the work.

Search for a country code using the **Value** field or enter the country’s name in the **Description** field to locate a country code.

In this example, services are being performed in the United States, so we will enter “United States” in the **Description** field. Click **Search** to return results.

Click **select** next to the country code to return it to the requisition.

Value	Description
USA	United States

Finally, complete the **Location of Services Provided (State)** field. Once again, clicking **Select from all values...** opens a new window where you can search and return the appropriate state.

The screenshot shows the 'Tax Information' form with three fields: 'Gross Up?', 'Services Provided (in what Country)', and 'Location State'. The 'Location State' dropdown menu is open, showing a search bar and a 'Select from all values...' button highlighted with a green box. 'Save' and 'Cancel' buttons are at the bottom.

In our example, services are being performed in Indiana, so we'll enter "Indiana" in the **Description** field to search for the state code.

The 'Custom Field Search' dialog box is shown with 'Indiana' entered in the 'Description' field. A 'Search' button is highlighted with a green box. A 'Close' button is in the top right corner.

Click **select** next to the state code to return it to the requisition.

The search results table shows one entry: 'IN' under the 'Value' column and 'Indiana' under the 'Description' column. A 'select' button is highlighted with a green box next to the 'Indiana' entry. The table also shows 'Results Per Page' set to 20 and 'Values Found 1'.

Once all fields are complete, click **Save** to save your changes.

The 'Tax Information' form is now complete. The 'Services Provided (in what Country)' field contains 'USA' and the 'Location State' field contains 'IN'. The 'Save' button is highlighted with a green box.

The Tax Information section is now complete.

## Orders Placed with Foreign Suppliers

The Tax Information section is in the left-hand menu of the requisition. Click **edit** in the upper right-hand corner to make changes.

Return to shopping cart

This order is ready to be placed. Place Order Assign Cart

**Requisitions: 134036432**  
Translation services - Into the Outback

Status: **Draft**  
Document Total: **1,000.00 USD**  
What's next for my order?

Requisitions ▾

- General ✓
- Shipping ✓
- Billing ✓
- Accounting Codes ✓
- Internal Notes and Attachm... ✓
- External Notes and Attach... ✓
- Integration ✓
- Special Payment Instructions ✓
- Recurring Payments ✓
- Tax Information ✓**
- Final Review ✓

**Tax Information** Document Actions ▾ History ? edit

Gross Up?	Location of Services Provided (Country)	Location of Services Provided (State)
no value	no value	no value

▼ **Lines** Selected Line Item Actions ▾

**David John Russell**  
[more info...](#)  
Kiama, NSW 2533,  
25/6 Terralong Street, Kiama, NSW 2533, AU

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	
1 Translation services for "Out of the Woods and into the Outback" <a href="#">more info...</a>		HR	50.00	20 HR	1,000.00 USD	<input type="checkbox"/>
Tax Information (same as header)						
					<b>Supplier subtotal</b>	1,000.00
					<b>Supplier total</b>	1,000.00 USD

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### Gross Up

First, update the Gross Up? field. Click **Select from all values...** to generate a drop-down menu containing a list of options. In this case, there are two options: No and Yes. This option must match what is selected on the [International Tax Coversheet](#) and submitted to University Tax Services.

**Tax Information** Document Actions ▾ History ? edit

Gross Up? Location of Services Provided (Country) Location of Services Provided (State)

**Select from all values...** Select from all values... Select from all values...

Save Cancel

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The table below explains each option as well as an example involving a \$1,000 payment. Use the online [NRA Calculator](#) to estimate the tax burden associated with the payment.

Option	Explanation	Example	
No	Payment reduced by tax calculation. Supplier receives payment less than amount stated on original invoice/requisition.	$\$1,000 \times 30\% = \$300$	Tax Calculation
		$\$1,000 - \$300 = \$700$	Net Supplier Payment
		$\$1,000$ Charged to Department	
Yes	Cost of payment to department increased by the amount of applicable tax. Supplier receives amount stated on original invoice/requisition.	$\$1,000 \div (1-30\%) = \$1,428.57$	Gross Up Amount
		$\$1,428.57 \times 30\% = \$428.57$	Tax Calculation
		$\$1,428.57 - \$428.57 = \$1,000$	Net Supplier Payment
		$\$1,000 + \$428.57 = \$1,428.57$	Charged to Department

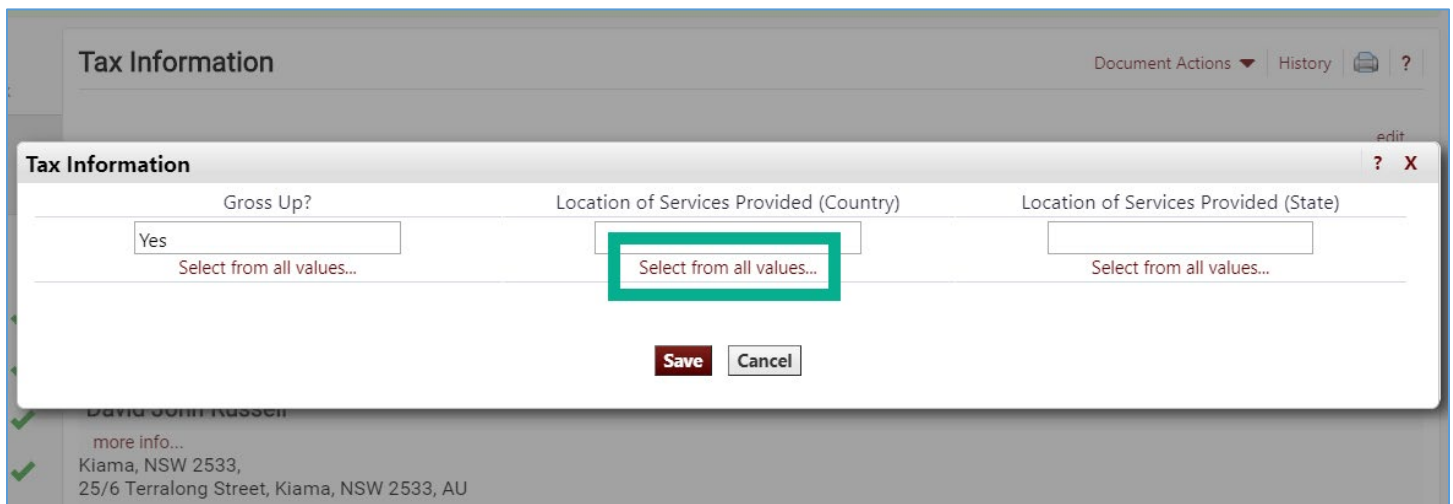
In this example, we will select “Yes” from the drop-down menu. We want the supplier to receive the amount listed on the requisition and our department will cover the additional expense.

### Location of Services Provided (Country)

Next, update the **Location of Services Provided (Country)** field. This field should reflect where services are being performed. Consider the following when completing this field:

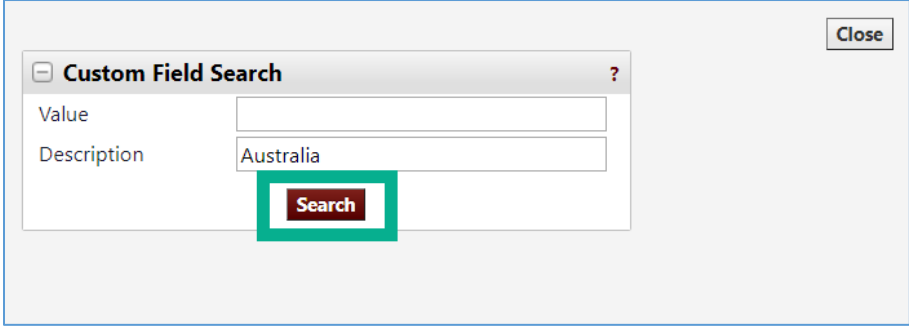
- Services performed online: Enter the country where the supplier is physically located when performing the work.
- Services performed in multiple countries including the United States: List the United States in this field.
- Services performed in multiple non-US countries: enter the country where most services will be performed.

Click **Select from all values...** to complete this field. A new window opens.



This new window has two fields. Search for a country code using the **Value** field or enter the country's name in the **Description** field to locate a country code.

In this example, translation services are being performed in Australia, so we will enter "Australia" in the Description field. Click **Search** to return results.



Close

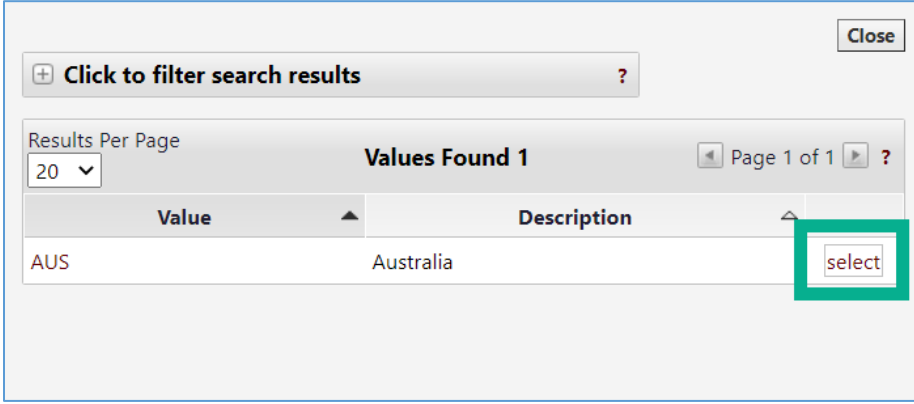
**Custom Field Search** ?

Value

Description

**Search**

Click **select** next to the country code to return it to the requisition.



Close

**Click to filter search results** ?

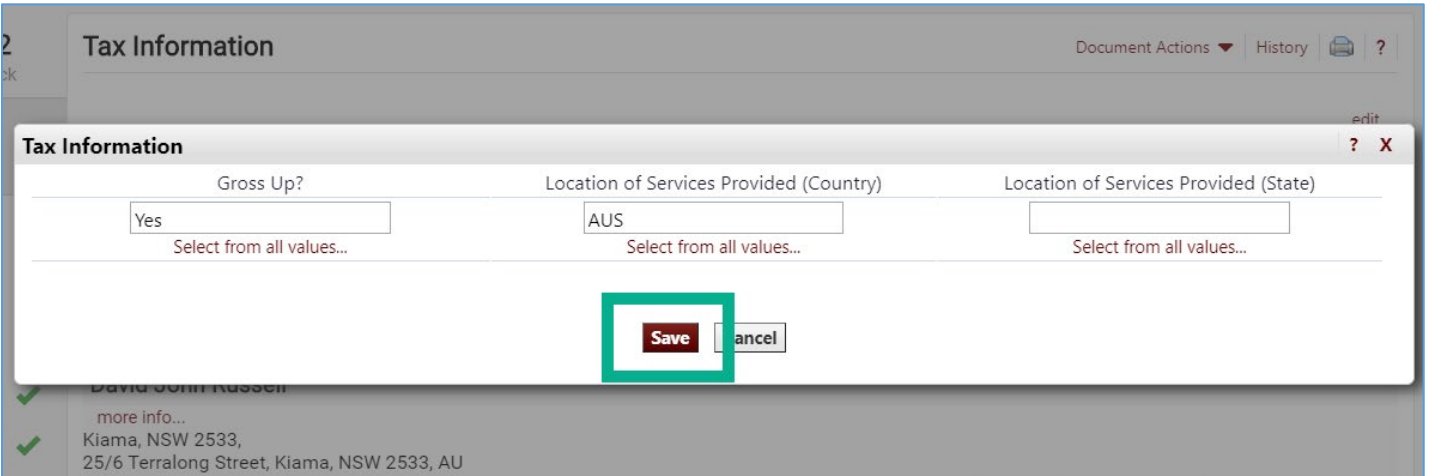
Results Per Page

**Values Found 1** Page 1 of 1 ?

Value	Description
AUS	Australia

**select**

Click **Save** to save your work.



2 Tax Information Document Actions History ?

**Tax Information** ? X

Gross Up?  Select from all values...

Location of Services Provided (Country)  Select from all values...

Location of Services Provided (State)  Select from all values...

**Save** Cancel

more info...  
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 25/6 Terralong Street, Kiama, NSW 2533, AU

The Tax Information section is now complete.