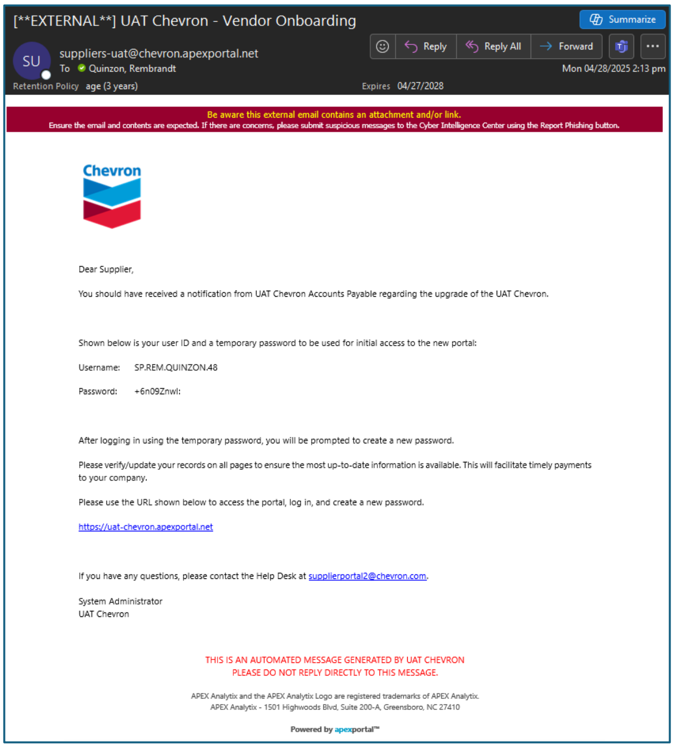
Supplier Updates Guide

Welcome to this basic navigation training material for Supplier Updates using the Supplier Portal Tool.
As the Supplier Contact, you will be responsible in editing your records within the Tool when you have updates on your information.
By the end of this material, you should be capable of completing and submitting the updates within the Tool.

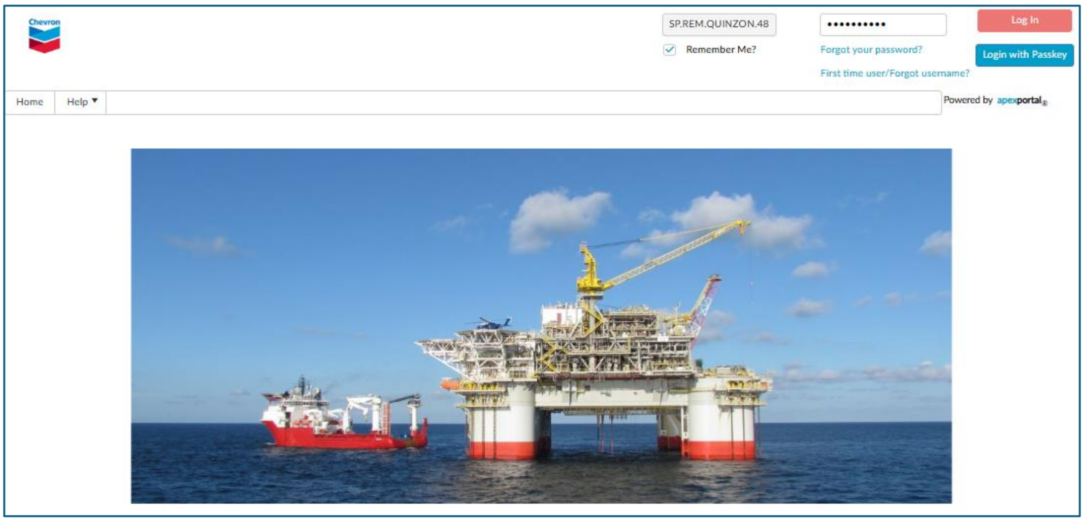
Before you begin:

If your update is on Tax ID, please connect with your authorized Chevron contact. This kind of update shall be treated as new record creation. Please **do not update your Tax ID** in your existing record.

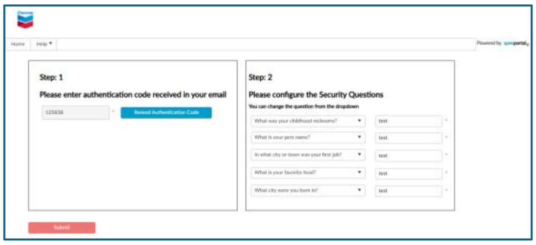
1. The update process begins when you receive a "Vendor Onboarding" email. This email contains your initial log-in credentials and some instructions. Just click the link in the email to access the Tool.

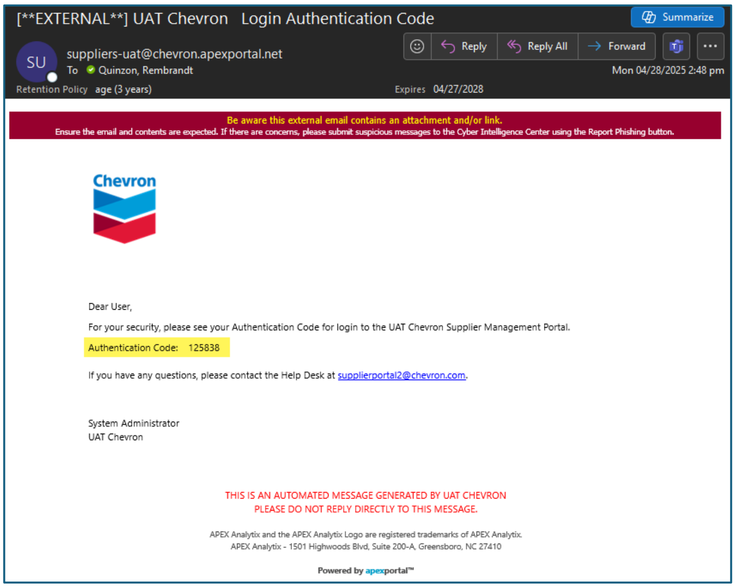


2. In the log-in page, input the username and temporary password from the invitation email. Click "Log In".



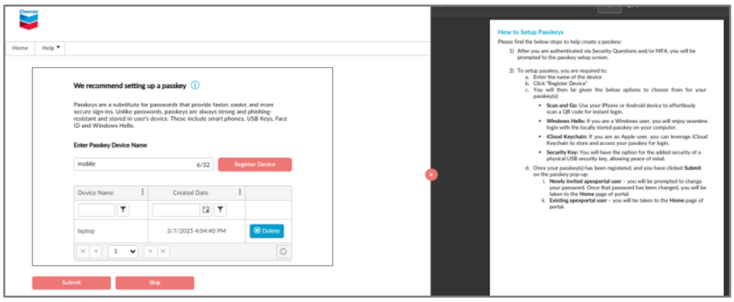
3. Upon log-in, you will be asked for the authentication code.





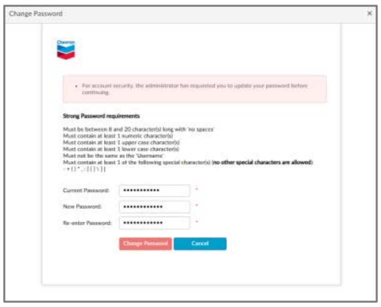
Check your inbox. You will receive another email for the "Login Authentication Code".
Copy the code and paste into the authentication code text box.
Then, set the 5 security questions and answers. Click "Submit".

4. You will be presented with an option to setup a passkey. It is up to you if you want to set this up or not. If you want to setup a passkey, simply follow the instruction shown on the right side of the screen.

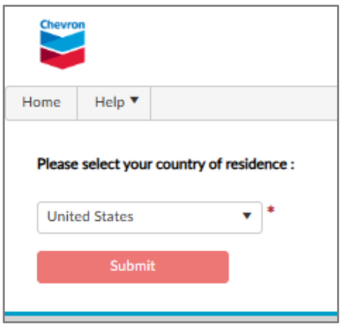


Once your preferred device(s) are added, click Submit.
Both Submit and Skip buttons will take you to the screen to change your temporary password.

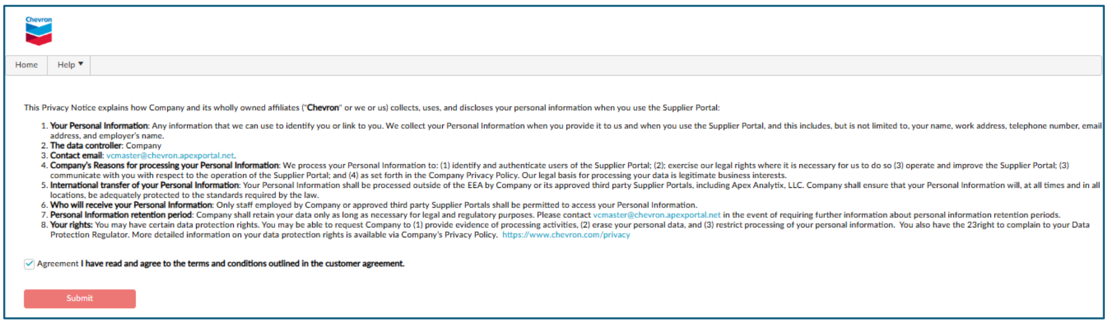
5. Update your password then click "Change Password".



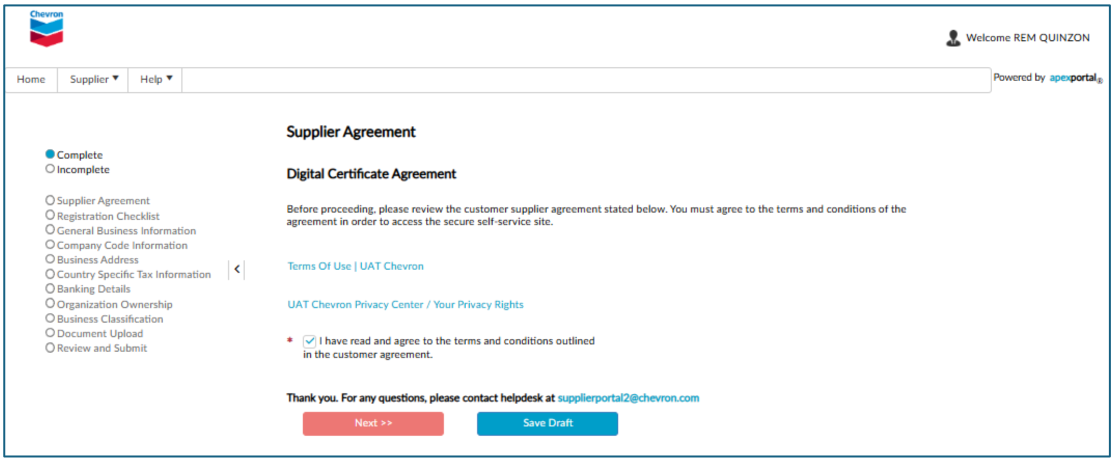
6. Select your country of residence then click “Submit”.



7. The next page will show the Privacy Notice. Review the items then put a check mark in the “Agreement” tick box. Click “Submit”.



8. On the Supplier Agreement page, click on the links on Terms of Use and Privacy Rights. After reviewing them, check on the box to agree, and then click “Next”.

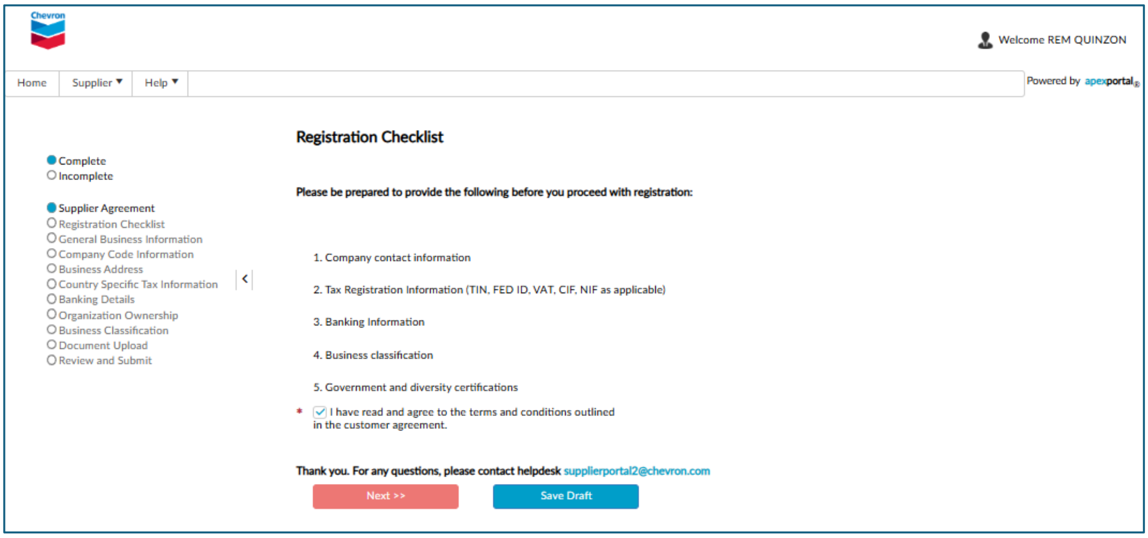


9. On the left side of the screen, you'll see a navigation list showing the grids/pages for the update process. As you complete each grid/page, the buttons will turn blue.

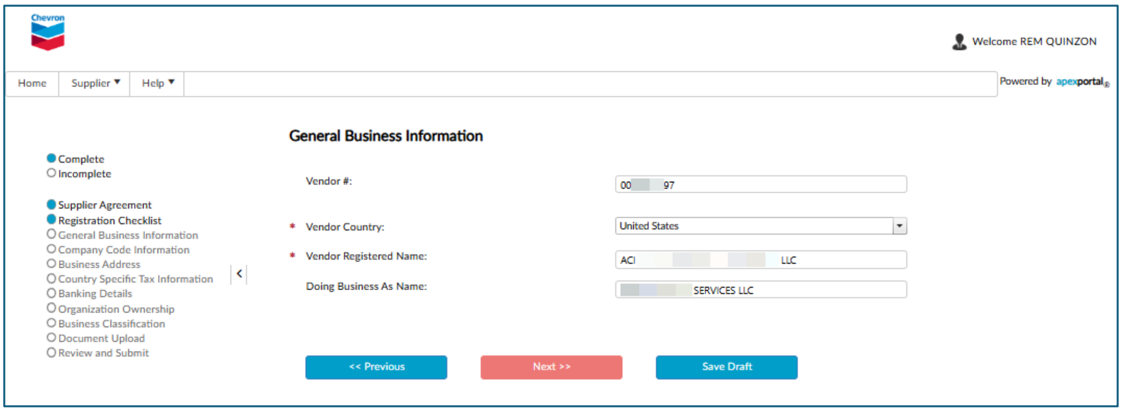
   The Registration Checklist grid provides reminders of the information needed throughout the registration.

   Please be informed that even if you only have to update a single detail from your record, the Tool will still require you to go through ALL the grids/pages up until submission. You may encounter required fields that are blank. Kindly input the details to those fields to proceed. This is to facilitate the validations embedded within the Tool.

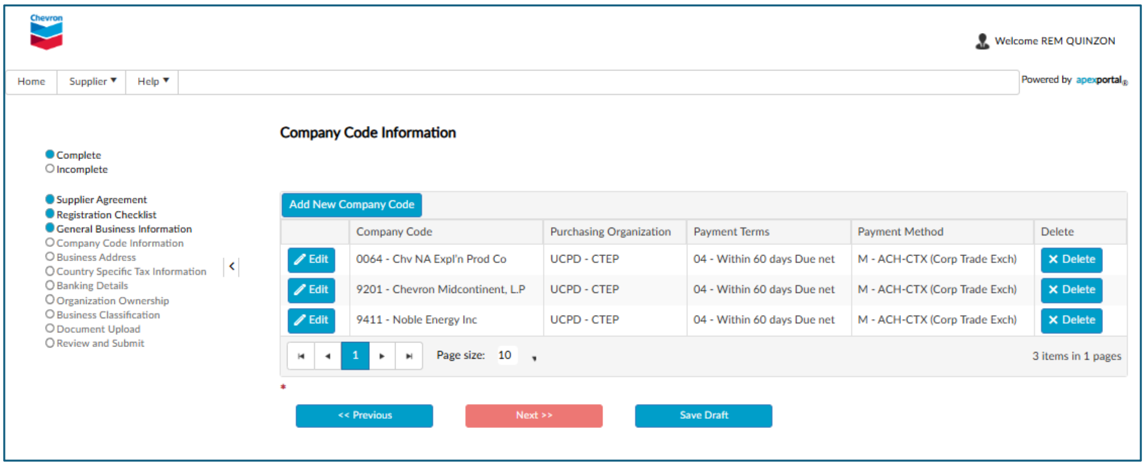
   Click "Next" to proceed.



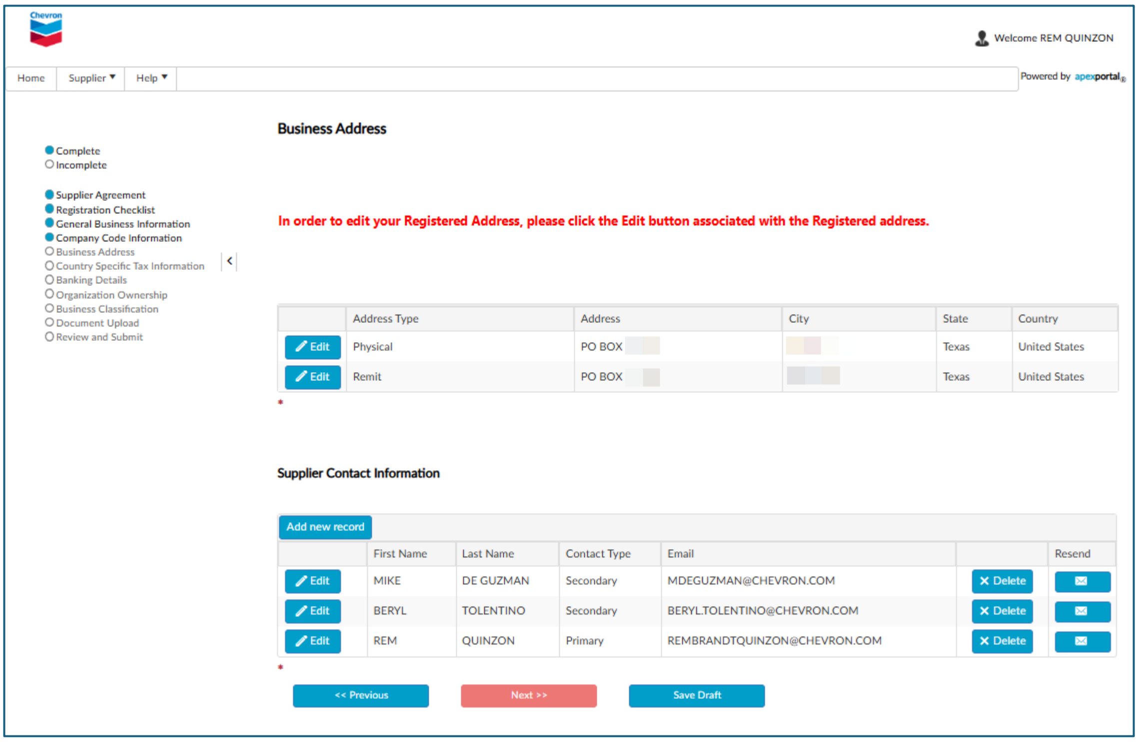
10. In the General Business Information grid, you will see your Vendor Country, Registered Name, and Doing Business As (DBA) Name.
    You may edit the details if you have updated your company name.
    Click "Next" to proceed.



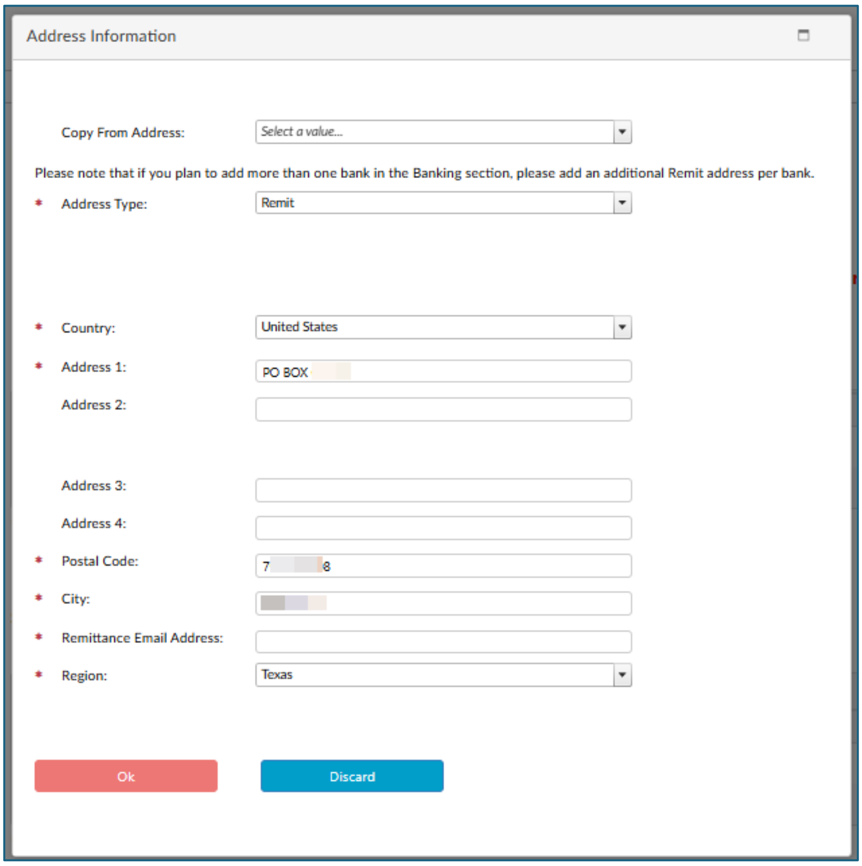
11. Company Code Information grid will list the Chevron location(s) who does business with your company. Click “Next” to proceed.



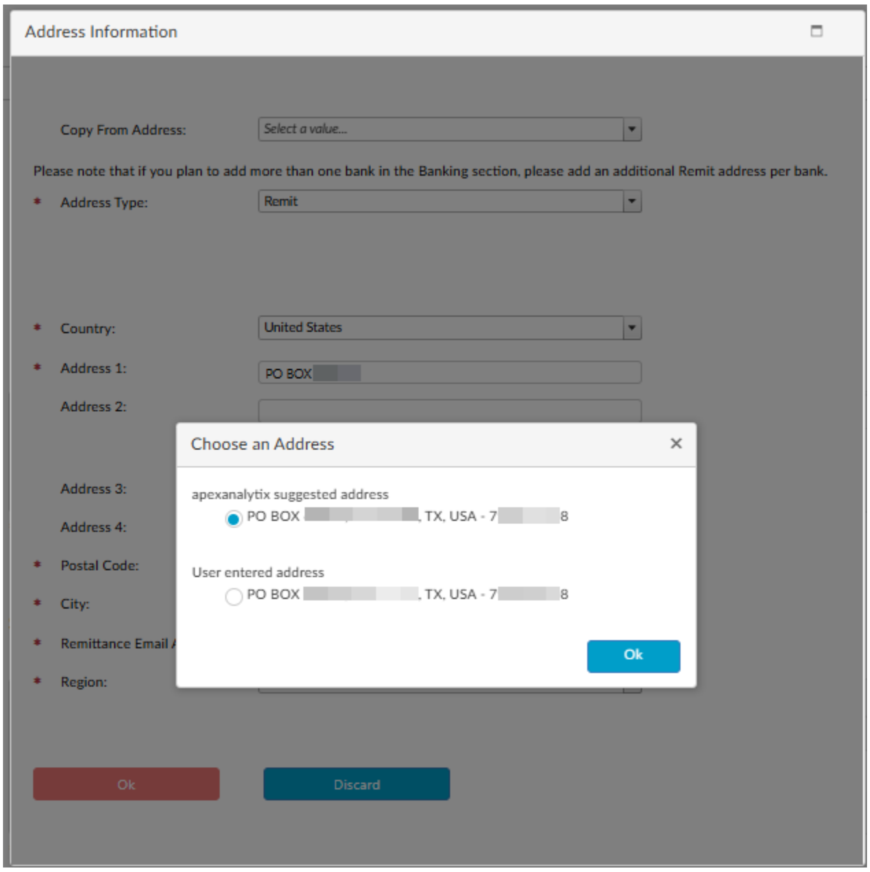
12. In the Business Address grid, click “Edit” for Remit address type.



An address information window will appear.
In the “Remittance Email Address” field, input the email address of the primary contact of your company.



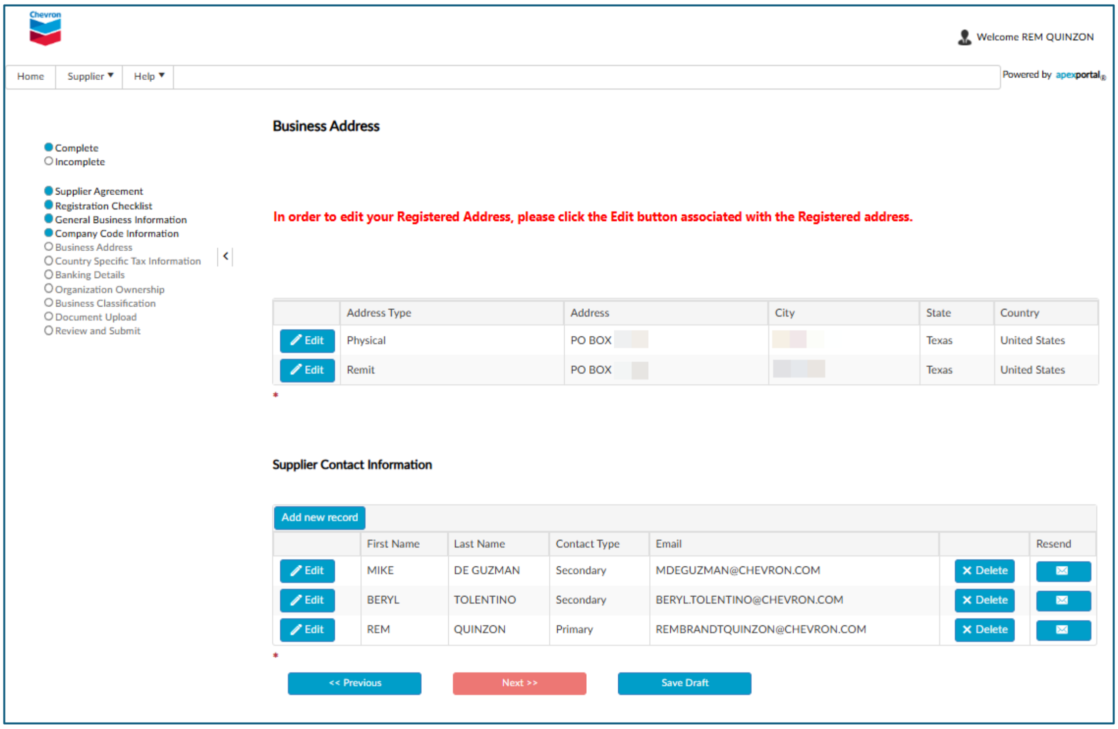
A pop-up window will appear showing apexanalytix suggested address and a user entered address.



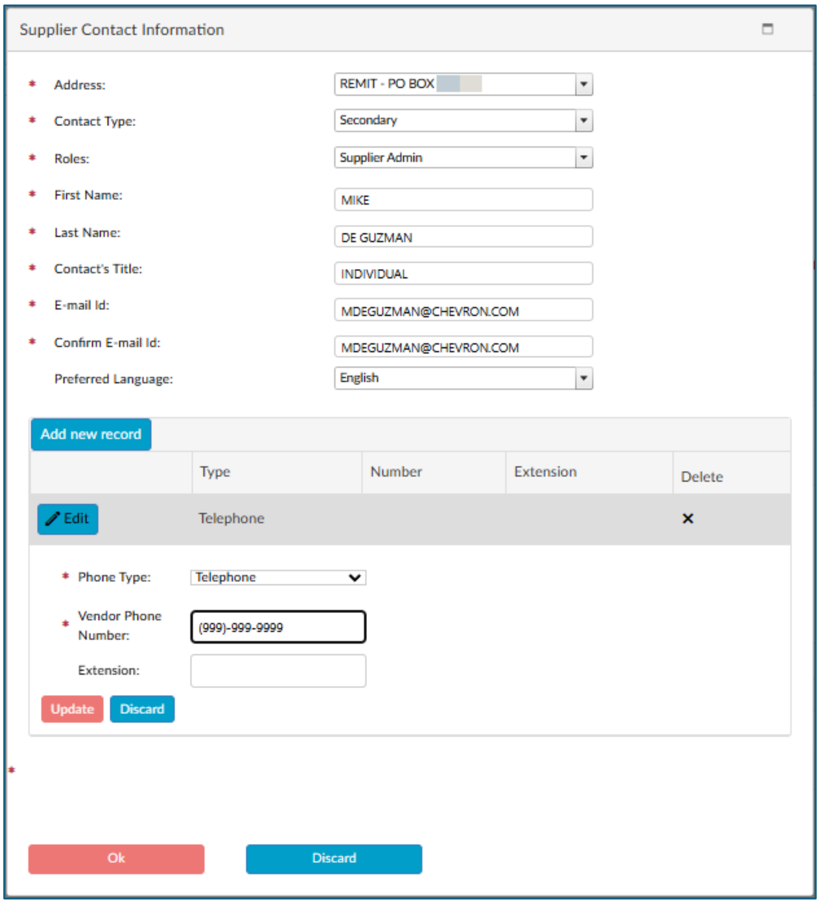
Review closely if the suggested address is correct.
If correct, select the suggested address then click “Ok”.
If it is far off, then select the user entered address then click “Ok”.
Click “Next”.

If you have an update for either your Physical or Remit addresses, simply click on the “Edit” button beside the address type, edit the required details, then click “Ok”.

13. Under Business Address is the Supplier Contact Information section.



If you need to add a new contact for your company, click “Add new record”.
Input all required fields accordingly.
Click “Edit” beside Telephone to add the phone number. Click “Update”.
Then click “Ok”.

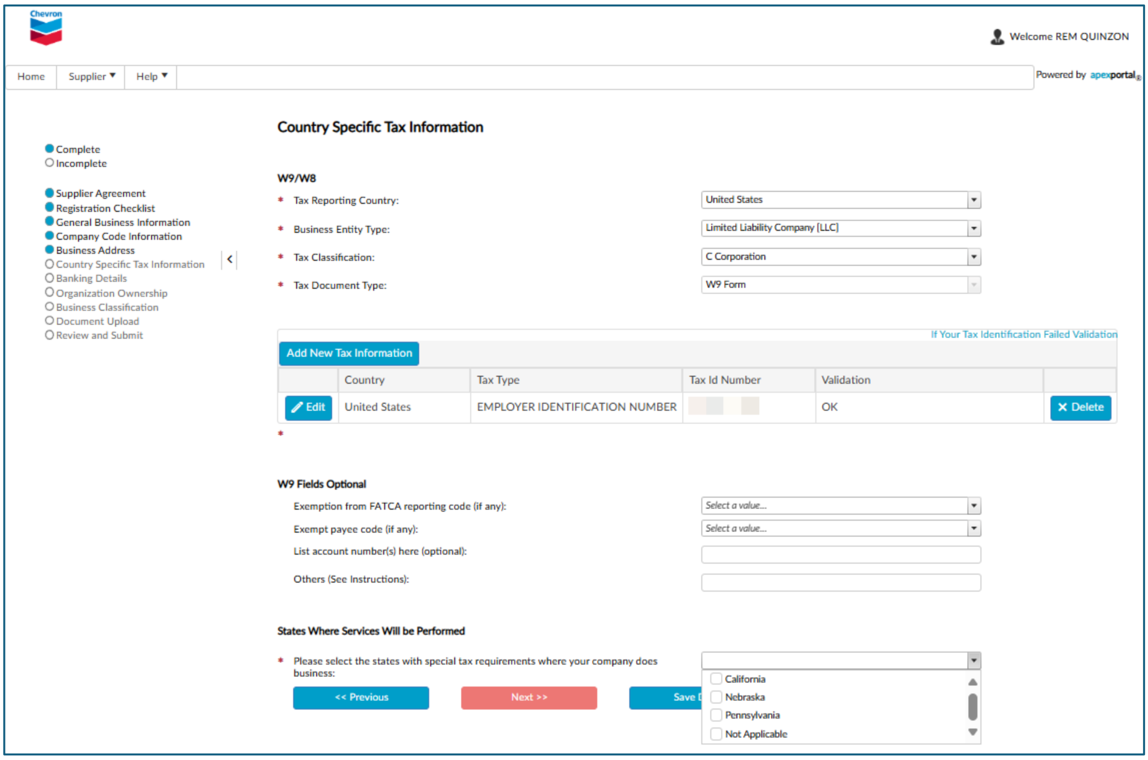


You may also edit existing contact information by clicking the "Edit" button beside the contact's name. Proceed with the updates, then click "Ok".

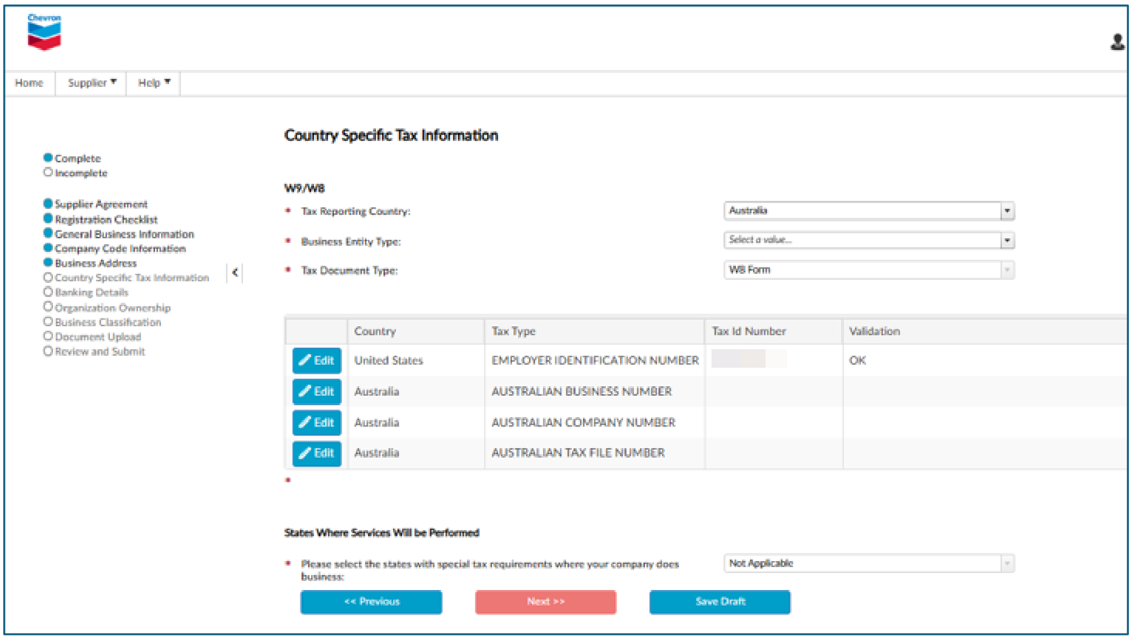
Click "Next" to proceed.

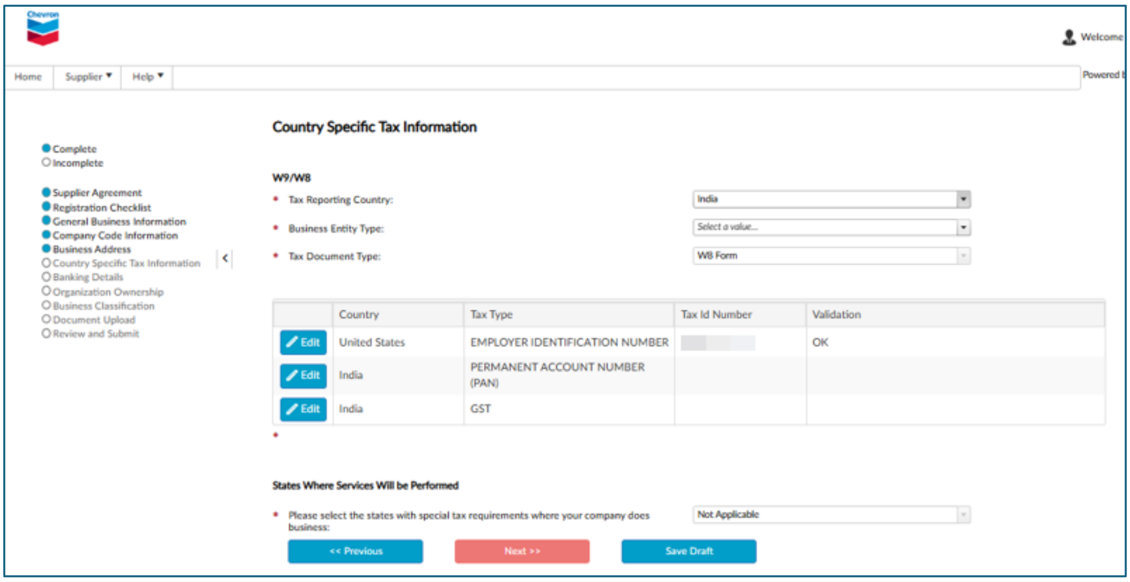
14. In the Country Specific Tax Information grid, input the required details.
Some fields and requirements depend on your selection.

If the “Tax Reporting Country” selected is “United States”, then the “Tax Document Type” field will display “W9 Form”.
The Tax Type(s) listed in the table will depend on the “Tax Reporting Country”.
A few more W9 optional fields, and the “States Where Services will be Performed” section are visible.

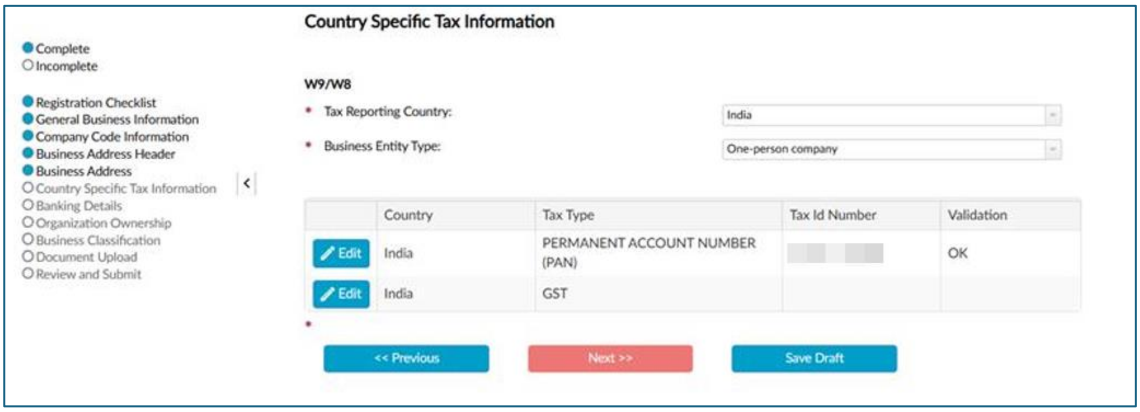


If the “Tax Reporting Country” is non-US, for example “Australia” or “India”, then the “Tax Document Type” field will display “W8 Form”.
The Tax Type(s) listed in the table will also depend on this selection.
The “States Where Services will be Performed” section is visible.

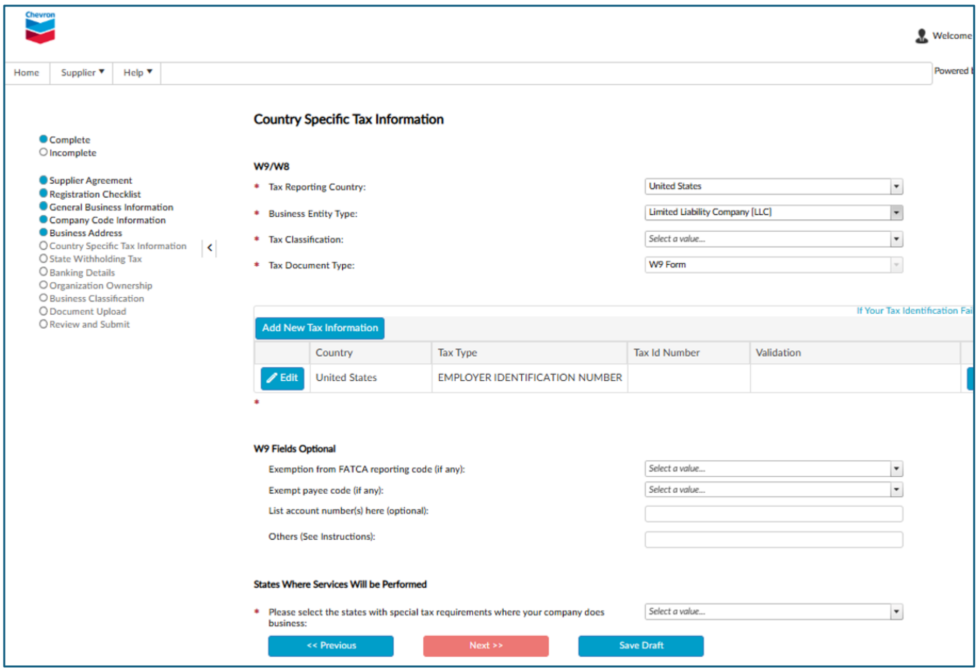


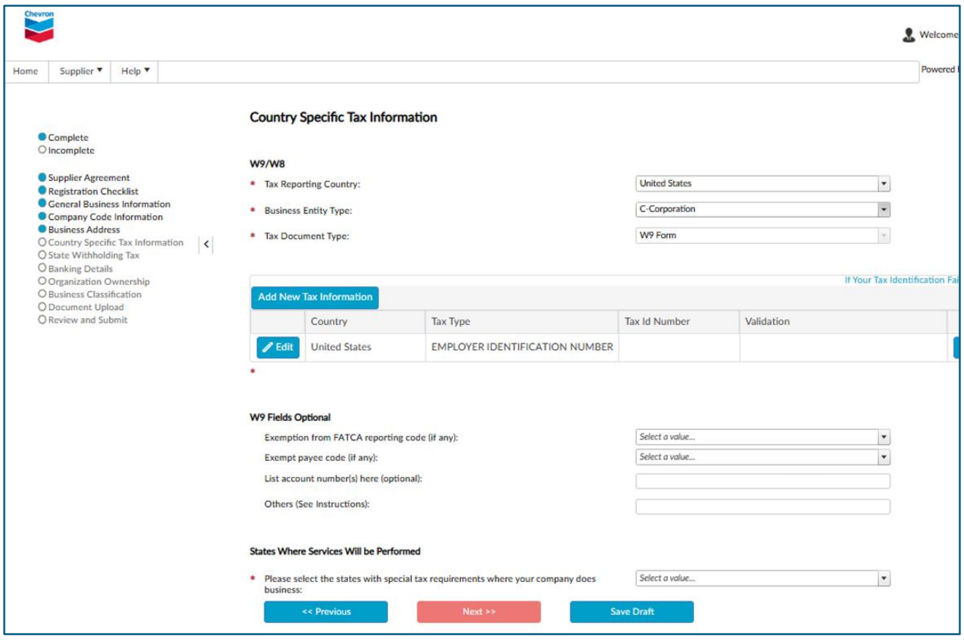


If your “Tax Reporting Country” is non-US, say “India”, and you are going to transact with Chevron that is also not located in US, then you will not see the “States Where Services Will be Performed” section.



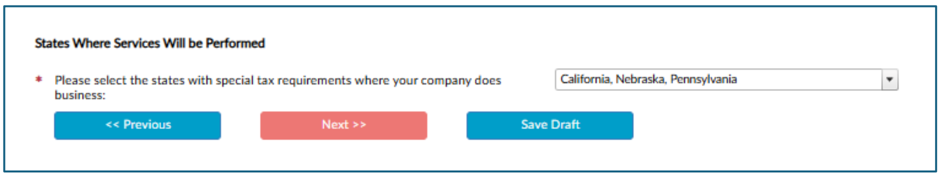
When you select “Limited Liability Company (LLC)” as Business Entity Type, a new field right below it named “Tax Classification” will display.
When you select “Corporation”, the “Tax Classification” field will not display.

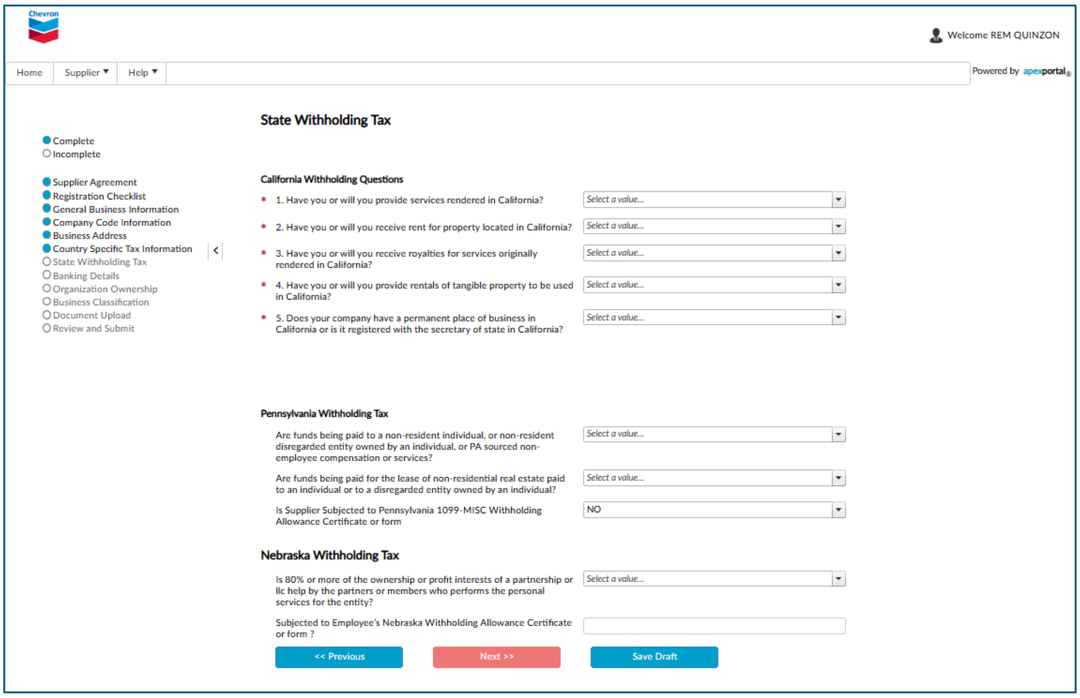




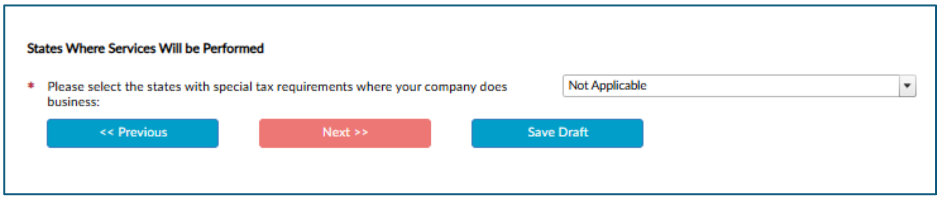
Under the “States Where Services Will be Performed” section, select the states with special tax requirements where your company does business.

If you selected any or either of the 3 states, additional questions would display based on your selection. Answer all required questions then click “Next”.



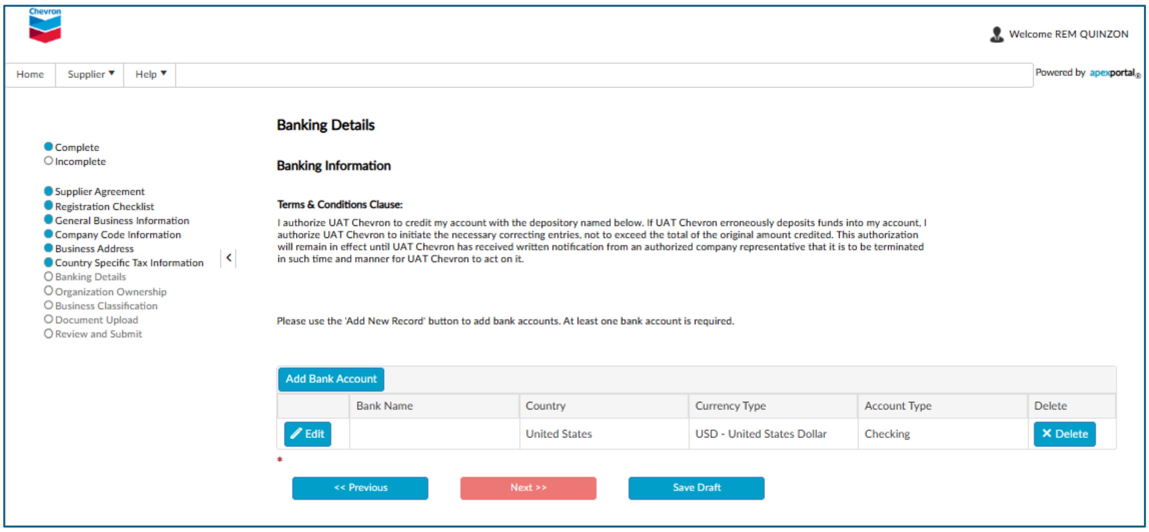


If this does not apply to your company, select "Not Applicable".

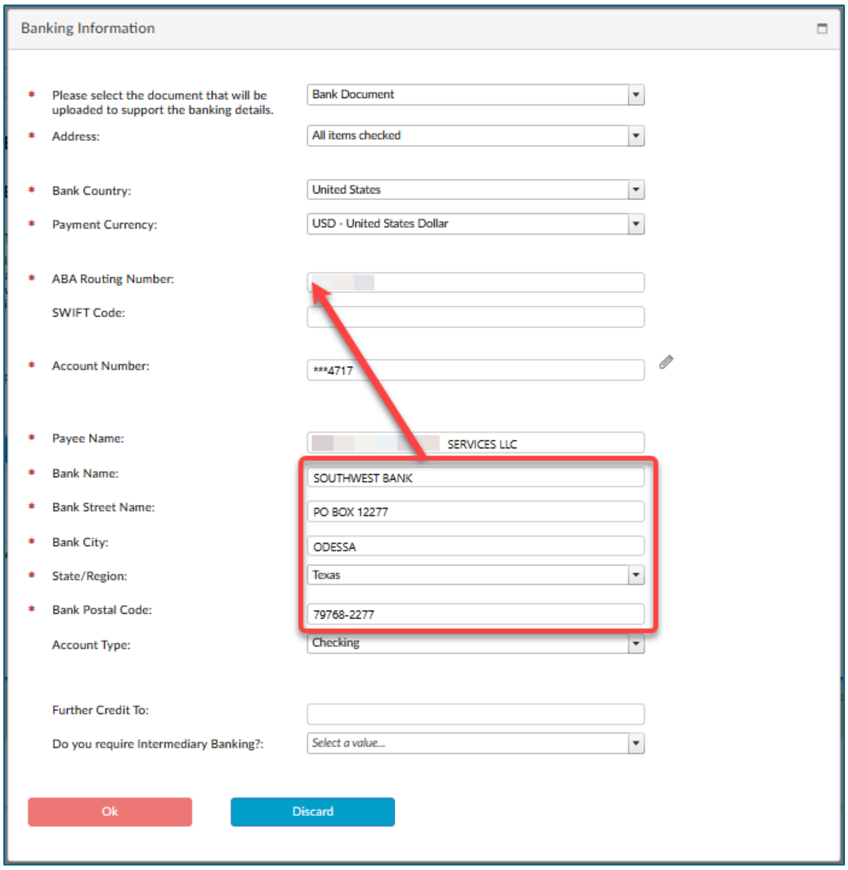


Click "Next" to proceed.

15. In the Banking Details grid, click on "Edit".



If you do not have updates on your Banking Information, input your current banking details to all the required fields with red asterisks.
When you input the “ABA Routing Number” field, otherwise known as Bank Key, several of the required bank details will auto-populate.

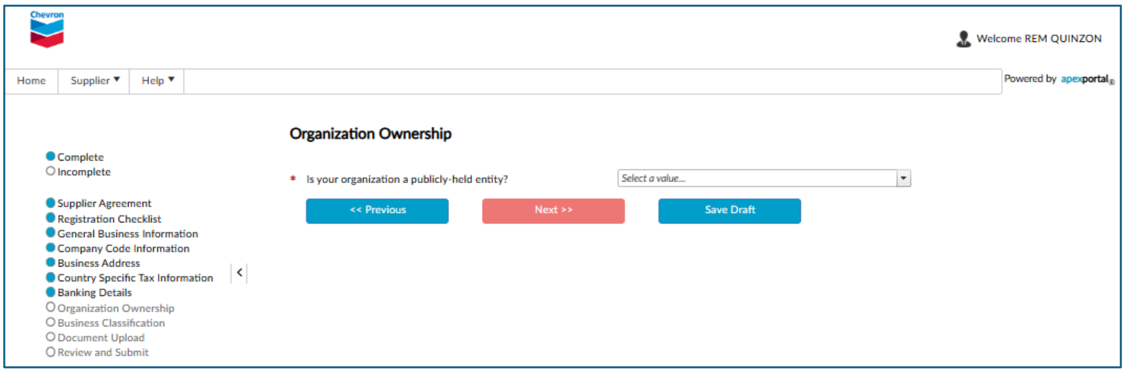


If you have updates on your Banking Information, input your updated banking details instead to all the required details to fields with red asterisks.

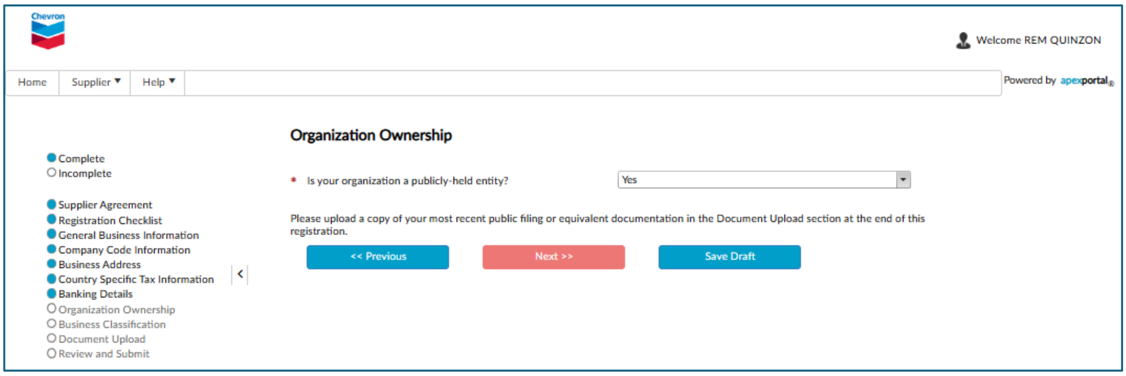
When your bank requires FFC (For Further Credit) instructions to receive a wire transfer, you can provide these as specified by your bank. FFC may be an account number or account name on file with your bank. Input these instructions and details in the “Further Credit To” text box.

Click “Ok”.
Then click “Next” to proceed.

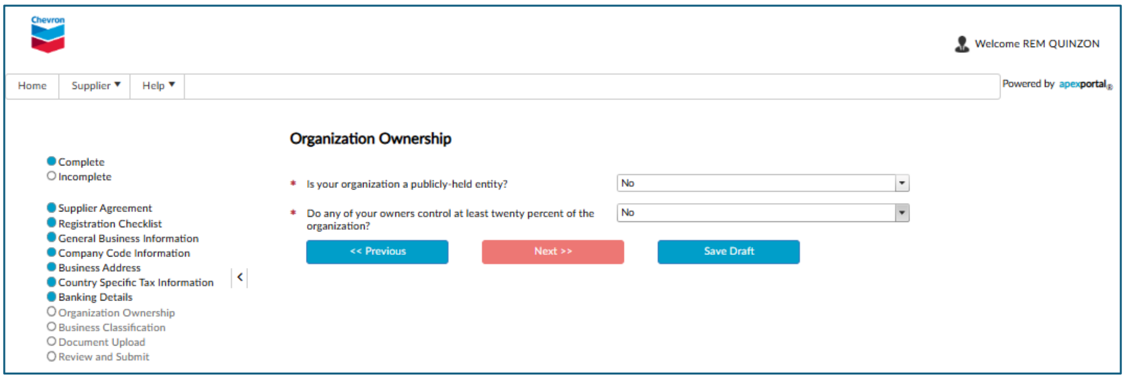
16. Update the Organization Ownership grid.
The first question asks if your company is a publicly held entity or is listed in the Stock Exchange.



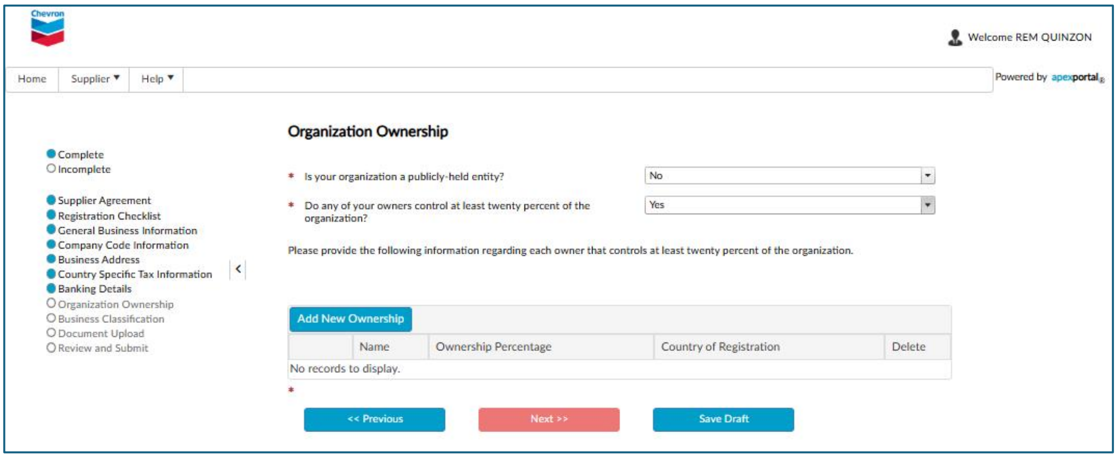
If you answered “Yes” to the first question, a document will be required for you to upload later. Click “Next” to proceed.



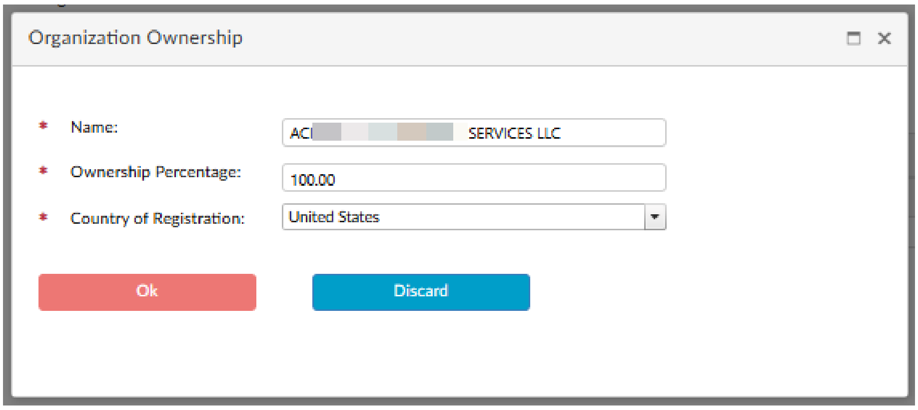
If you answered “No”, a second question will display.
If you answered “No” to the second question, you could proceed to the next grid by clicking “Next”.



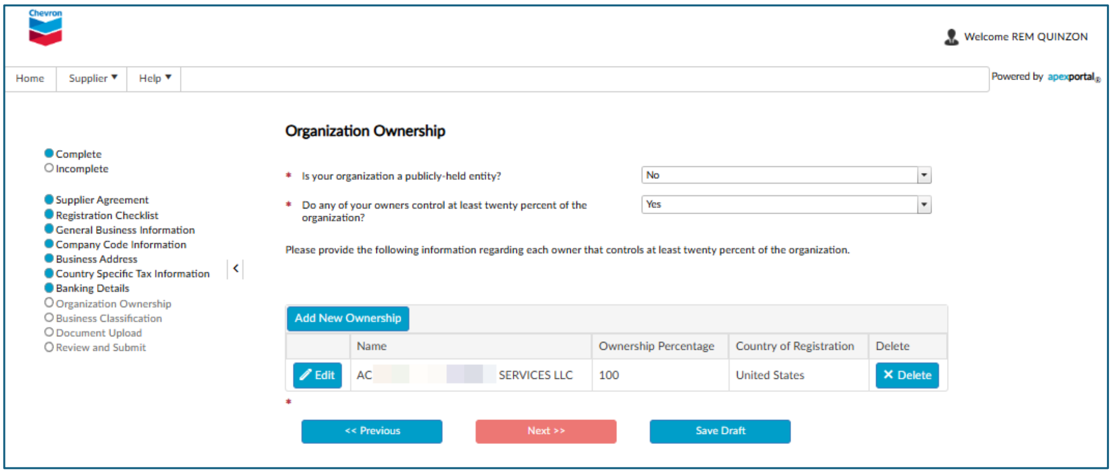
If you answered “Yes” to the second question, a table would display for you to update. Click on “Add New Ownership”.



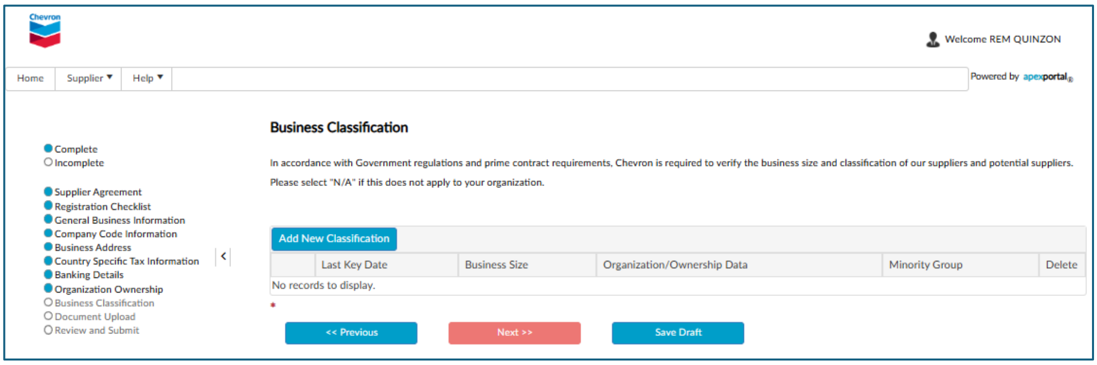
Input the required details then click “Ok”.



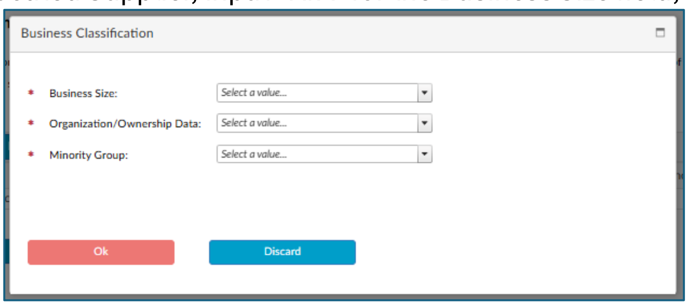
Then click “Next” to proceed.



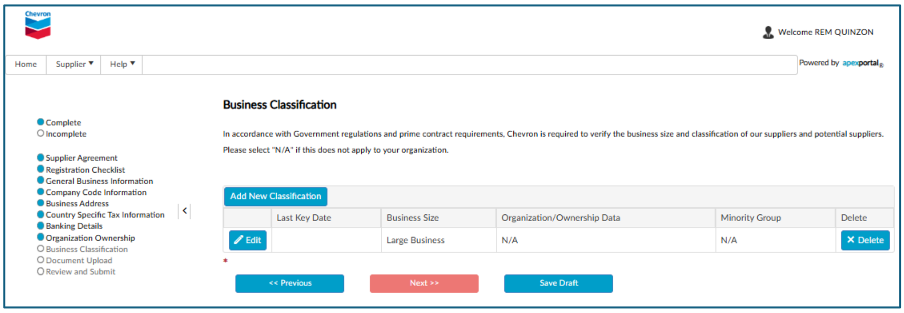
17. In the Business Classification grid, click on “Add New Classification”.



Input the required details.
If you are a US located Supplier, input details as you see fit for these fields. Then click “Ok”.
If you are a non-US located Supplier, input “N/A” for the Business Size field, then click “Ok”.



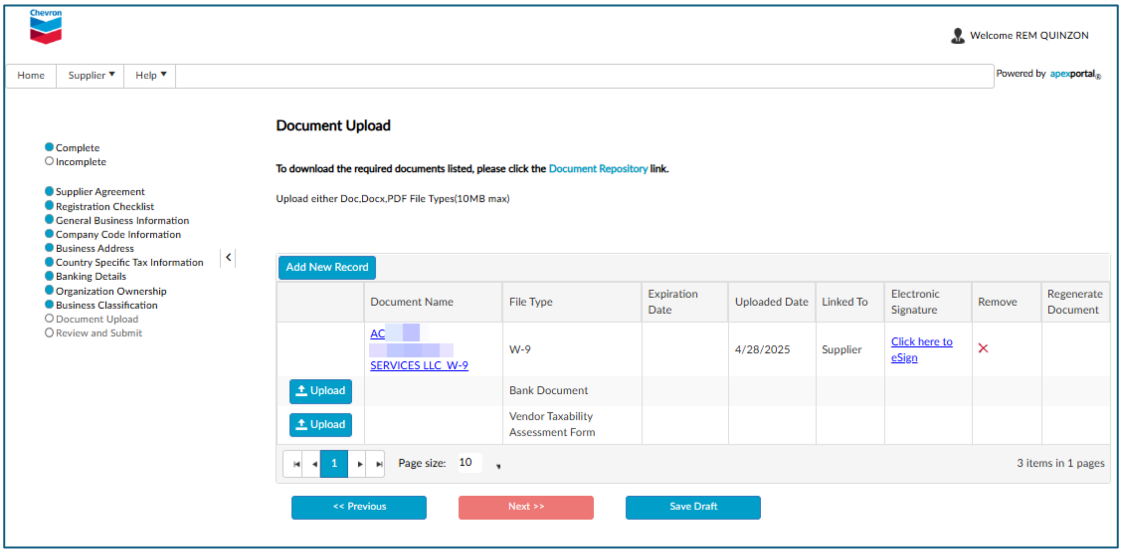
Click “Next” to proceed.



18. The Document Upload grid lists all required documents based on the selections you’ve made from the previous grids throughout the process.

    If you are a non-US supplier, you are required a W-8 form.
    This form is not yet available for e-signature in this Tool. You need to upload this form.

    If you are a US supplier, you are required a W-9 form.
    The Portal has a built-in W-9 form available for e-signature.
    Click on the “Click here to eSign” link under the Electronic Signature column of the summary table.



To electronically sign, review the details in the W-9 form then scroll down.
There are 2 tick boxes that will identify if you Agree to the statements beside.
Click on those 2 tick boxes then click "Submit".

Form **W-9** (Rev. March 2024) Department of the Treasury Internal Revenue Service

Request for Taxpayer Identification Number and Certification

Go to *www.irs.gov/FormW9* for instructions and the latest information.

Give form to the requester. Do not send to the IRS.

Before you begin. For guidance related to the purpose of Form W-9, see *Purpose of Form*, below.

1 Name of entity/individual. An entry is required. (For a sole proprietor or disregarded entity, enter the owner's name on line 1, and enter the business/disregarded entity's name on line 2.)

AC[redacted] SERVICES LLC

2 Business name/disregarded entity name, if different from above.

DBA ACID TECH SERVICES LLC

3a Check the appropriate box for federal tax classification of the entity/individual whose name is entered on line 1. Check only **one** of the following seven boxes.

☐ Individual/sole proprietor ☐ C corporation ☐ S corporation ☐ Partnership ☐ Trust/estate

☑ LLC. Enter the tax classification (C = C corporation, S = S corporation, P = Partnership) C

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any)

Certification
Under penalties of perjury, I certify that:

1. The number shown on this form is correct taxpayer identification number (or) I am waiting for a number to be issued to me.
AND
2. I am not subject to backup withholding because:
   a. I am exempt from backup withholding, or
   b. I have not been notified by the Internal Revenue Service(IRS) that I am subject to backup withholding as a result of a failure to report all interest of dividends or
   c. The IRS has notified me that I am no longer subject to backup withholding.
3. I am a U.S. citizen or other U.S. person (defined below).
Definition of a U.S. Person. For federal tax purposes, you are considered a U.S. person if you are:
   a. An individual who is a U.S. citizen or U.S. Resident alien,
   b. A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States,
   c. An estate (other than a foreign estate), or
   d. A domestic trust (as defined in regulations section 301.7701-7)

Electronic System Submission:
Under penalties of perjury I certify that:

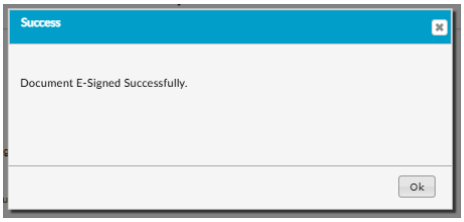
* *I am the same person (or payees agent) accessing the system and submitting this form as identified on the Substitute Form W-9.* ☑ *Agree*

* *By submitting this form electronically, I am affixing my electronic signature as the payee identified on the Substitute Form W-9* ☑ *Agree*

"The Internal Revenue Service does not require your consent to any provision of this document other than the certifications required to avoid backup withholding."

Submit

A pop-up message will confirm that the W-9 has been successfully e-signed. Click "Ok".

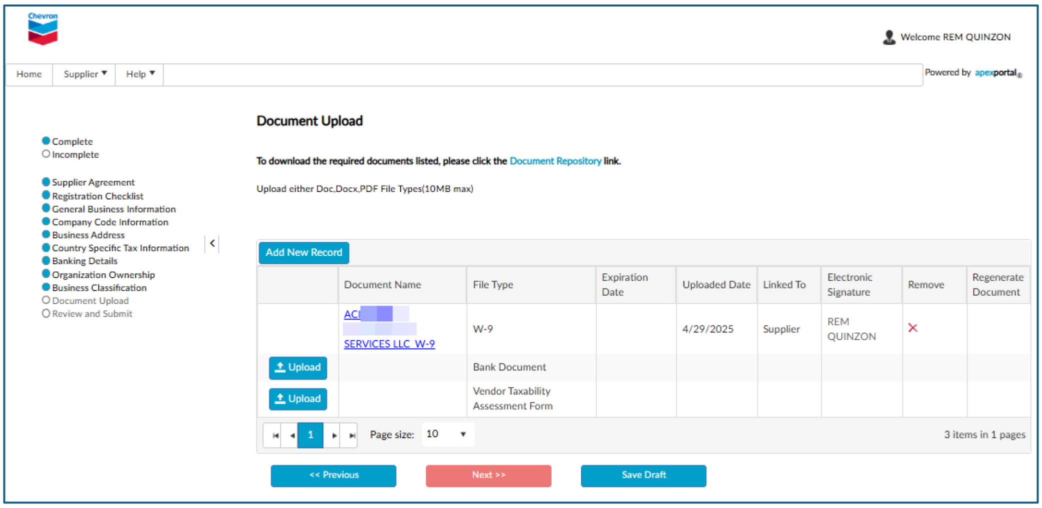


Success

Document E-Signed Successfully.

Ok

Upload the rest of the required documents.
Click on the "Upload" button next to the file type listed.



Chevron

Welcome REM QUINZON

Home | Supplier ▾ | Help ▾ | Powered by apexportal

● Complete
○ Incomplete

● Supplier Agreement
● Registration Checklist
● General Business Information
● Company Code Information
● Business Address
● Country Specific Tax Information
● Banking Details
● Organization Ownership
● Business Classification
○ Document Upload
○ Review and Submit

Document Upload

To download the required documents listed, please click the Document Repository link.

Upload either Doc,Docx,PDF File Types(10MB max)

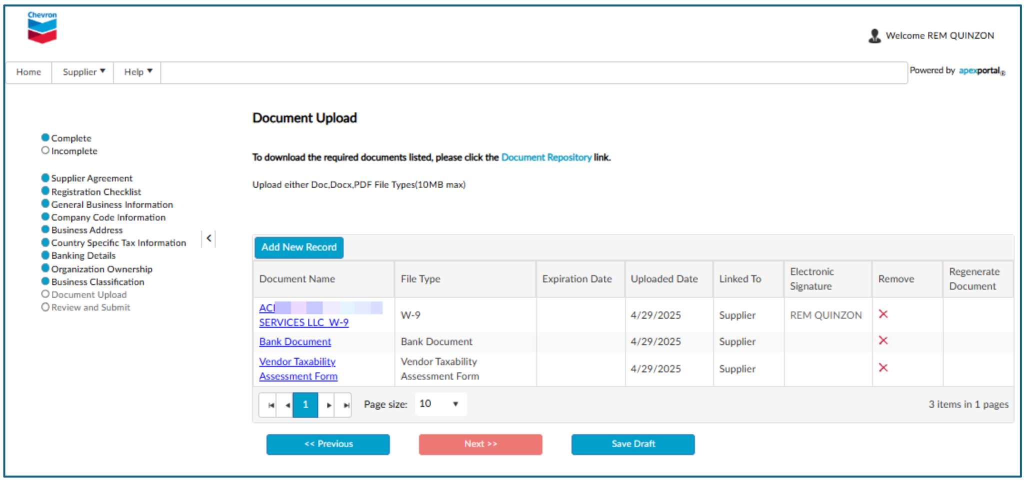
Add New Record

	Document Name	File Type	Expiration Date	Uploaded Date	Linked To	Electronic Signature	Remove	Regenerate Document
	AC[redacted] SERVICES LLC_W-9	W-9		4/29/2025	Supplier	REM QUINZON	✕	
Upload		Bank Document						
Upload		Vendor Taxability Assessment Form						

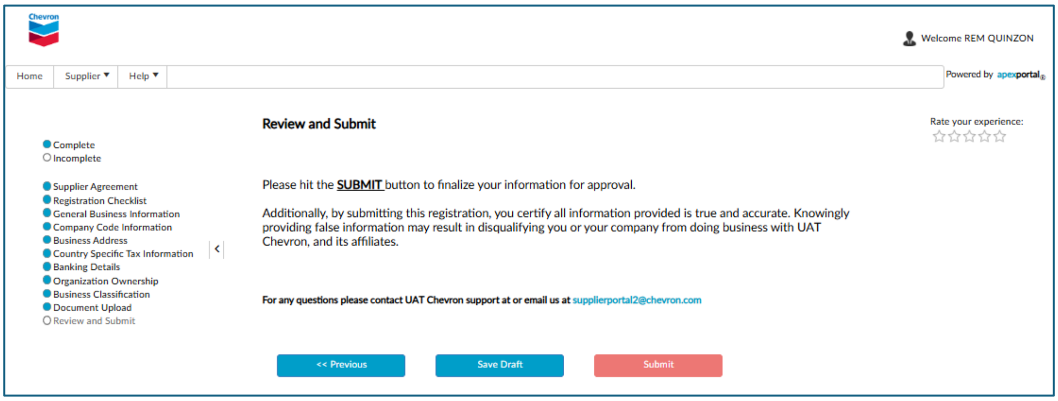
1 | Page size: 10 | 3 items in 1 pages

<< Previous | Next >> | Save Draft

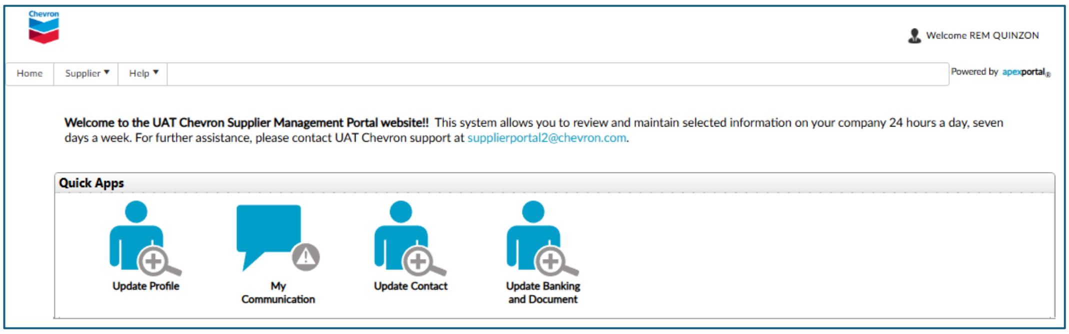
After uploading all required documents, click "Next" to proceed.



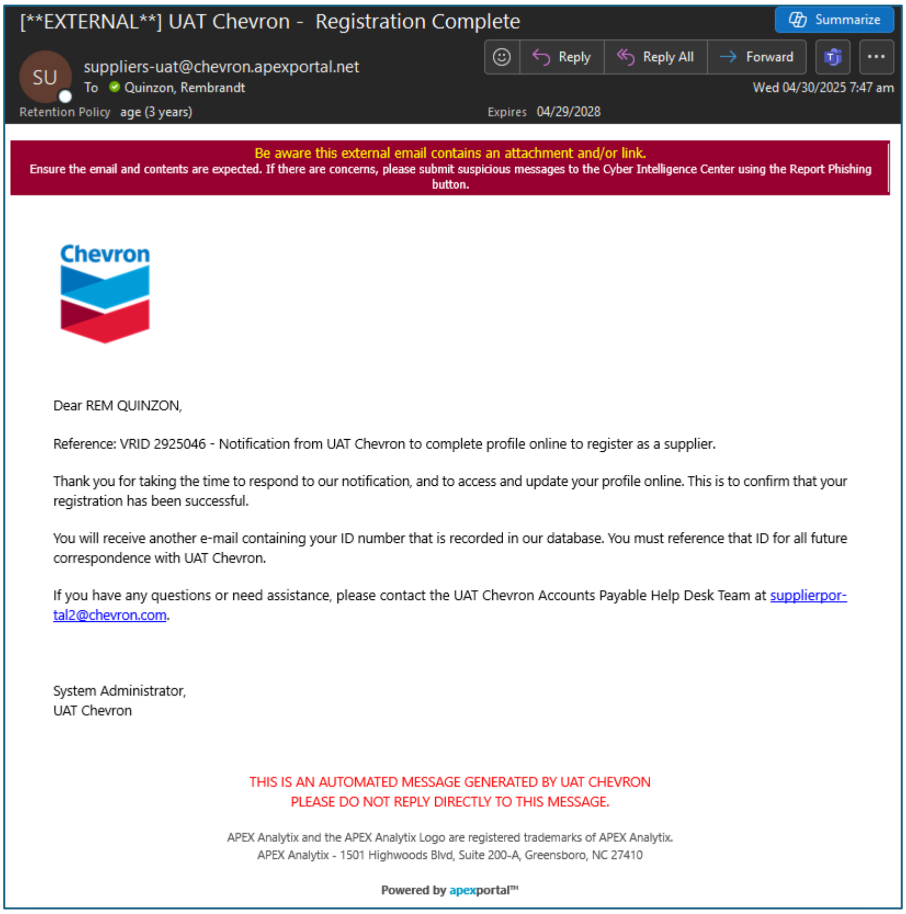
19. The final page is the Review and Submit.
    You can review all information you have provided so far by clicking the grid name listed on the left side panel.
    To finalize your updates, click on "Submit".



20. After submission, you will be directed back to your homepage.



You will receive an email notification confirming that your updates have been recorded.



[**EXTERNAL**] UAT Chevron - Registration Complete

Summarize

Reply Reply All Forward

SU suppliers-uat@chevron.apexportal.net

To Quinzon, Rembrandt

Wed 04/30/2025 7:47 am

Retention Policy age (3 years) Expires 04/29/2028

Be aware this external email contains an attachment and/or link.
Ensure the email and contents are expected. If there are concerns, please submit suspicious messages to the Cyber Intelligence Center using the Report Phishing button.

Chevron

Dear REM QUINZON,

Reference: VRID 2925046 - Notification from UAT Chevron to complete profile online to register as a supplier.

Thank you for taking the time to respond to our notification, and to access and update your profile online. This is to confirm that your registration has been successful.

You will receive another e-mail containing your ID number that is recorded in our database. You must reference that ID for all future correspondence with UAT Chevron.

If you have any questions or need assistance, please contact the UAT Chevron Accounts Payable Help Desk Team at supplierportal2@chevron.com.

System Administrator,
UAT Chevron

THIS IS AN AUTOMATED MESSAGE GENERATED BY UAT CHEVRON
PLEASE DO NOT REPLY DIRECTLY TO THIS MESSAGE.

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APEX Analytix - 1501 Highwoods Blvd, Suite 200-A, Greensboro, NC 27410

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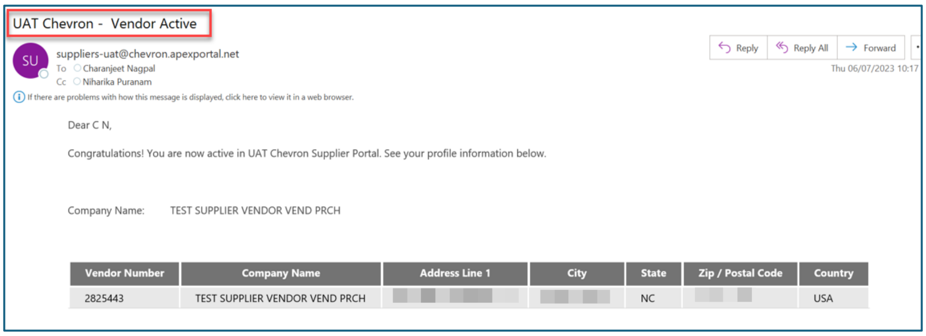
After some time, you will receive another email notification once your updates have been approved, and your updated account is now Active in the Supplier Portal Tool.



UAT Chevron - Vendor Active

Reply Reply All Forward

SU suppliers-uat@chevron.apexportal.net

To Charanjeet Nagpal

Cc Niharika Puranam

Thu 06/07/2023 10:17

If there are problems with how this message is displayed, click here to view it in a web browser.

Dear C N,

Congratulations! You are now active in UAT Chevron Supplier Portal. See your profile information below.

Company Name: TEST SUPPLIER VENDOR VEND PRCH

Vendor Number	Company Name	Address Line 1	City	State	Zip / Postal Code	Country
2825443	TEST SUPPLIER VENDOR VEND PRCH	[illegible]	[illegible]	NC	[illegible]	USA

Here ends the basic navigation training material for Supplier Updates using the Supplier Portal Tool. Congratulations! You have successfully completed and submitted your updates using the Tool.