



## FAQs for completing an electronic tax form

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### 1) Q: Where do I find my Vendor ID and Registration code?

A: This information is in the same letter as the Digital W-8 URL. You need this information to log on to the system. *If you no longer have that letter, you may obtain the logon identifier codes by sending an e-mail to [10421099taxcertprocess@sps.boeing.com](mailto:10421099taxcertprocess@sps.boeing.com).*

### 2) Q: Why does the system require me to enter my mailing country/permanent country/citizen country and ask me to complete the first three letters of the address cities?

A: This identifies that your vendor information corresponds with the assigned vendor ID number entered. Your answers on this page must match the address The Boeing Company has on file, sent to you in the W-8/W-9 request letter. If these answers are not identical, authorization will be denied. However, if initially Boeing did not have one of these fields on file, you may populate it in this screen. Additionally, the first three letters of your permanent and mailing cities are requested to confirm we can pre-populate this information when it is required subsequently. If these fields are not completed, you must manually enter your address information (excluding the country) later in the process.

### 3) Q: Why are there so many questions to certify foreign tax status?

A: Determining tax status under U.S. tax laws is a complicated process. This system was designed to simplify and streamline the process of completing and mailing valid paper tax forms and entering the correct treaty certifications.

Entering your information in the tax form certification module is the fastest method of confirming your tax status so you can claim tax treaty benefits.

**4) Q: I would like to electronically sign my tax form but I did not receive my PIN**

A: Please check the junk or spam folder for the email account entered. Some email service providers identify automatically-generated email as spam. If you do not find it there you may obtain a new PIN by saving the certifications made thus far, and re-entering the system. The system will request a new email address each time you log in and will send you a new PIN for each login.

**5) Q: I am not comfortable with the electronic signature. What is my alternative?**

A: There are two options for you. You may complete your form by answering the questions in the interview process of the Digital W-8, and then use the print-and-mail feature, where you will be required to print out the form that is completed by the system, sign and date the form, and then mail in the original hard copy. By rejecting the e-sign option, you will be able to access the print-and-mail function. Alternatively, you may complete a paper tax form and send the original hard copy. Paper Forms W-8, 8233 and W-9 can be found on the IRS website ([www.irs.gov](http://www.irs.gov)). If you are submitting a Form W-8 or 8233, you must mail in the original, hard copy of the form to the address below:

CTI/Boeing Tax Certification  
P.O. Box 747  
Andover, MA 01810

Forms W-8 or 8233 received by fax or email are not valid. If you are submitting a Form W-9, you may mail it to the addresses listed above or fax the form to

(617) 963-3484

**When mailing or faxing in forms, label them clearly with your Vendor ID, noting the number indicated as your Vendor ID.**

**6) Q: What is a valid “capacity” for the signor of a form W-8BEN?**

A: The capacity listed on a W-8BEN must indicate the person signing has authority to sign a tax return for the company submitting the form. It can be hard to determine if this is the case through the position listed in the capacity line of the W-8BEN. Therefore, Forms W-8BEN will only be accepted if the capacity of the signor clearly describes the signor as a high-ranking officer of the company. If there is a question about the capacity listed, you will be contacted for additional details or documentation to prove that the signor has the appropriate authority.

**7) Q: Are all forms eligible for electronic submission?**

A: At this time, only the Forms W-8BEN and W-9 are eligible for electronic submission. The system notifies you if a mailed hard-copy form is required.

**8) Q: How do I know which tax form to complete?**

A: The Digital W-8 application indicates the appropriate form according to the answers provided in the interview. In general, a Form W-9 will be required from all U.S. persons, companies, partnerships, etc. A Form W-8BEN is required from non-U.S. individuals and companies who are the beneficial owner of the income received and may be used to claim a treaty benefit for income that is not personal services income. A Form 8233 is required of individuals claiming a treaty on personal services income. A Form W-8ECI is used by persons claiming income received is effectively connected with a U.S. trade or business. A W-8IMY is required to be submitted for non-U.S. partnerships. Forms W-9 and W-8BEN can be electronically signed in the Digital W-8 and forms W-8ECI and IMY must be submitted by mail.

**9) Q: What will be required if I am a non-U.S. partnership?**

A: Non-U.S. partnerships are required to submit the following: An original Form W-8IMY for the partnership itself, a withholding statement listing the underlying owners and their allocation information, and the appropriate tax form for each underlying owner listed in the withholding statement. As the partners themselves are considered the beneficial owners of the income by the U.S. tax authorities, these are the forms which will be used to determine the appropriate rate of withholding

on the payments made. In certain cases, if a non-U.S. entity is considered a partnership for U.S. tax purposes, but is not fiscally transparent under domestic law, they may be eligible to complete the Form W-8BEN if they are making a valid treaty claim on the form. These forms will be required to be submitted in hard copy to the following address:

Compliance Technologies International, LLP  
Boeing Tax Certification  
200 Brickstone Square, Suite 403  
Andover, MA 01810  
*(If using a delivery service such as DHL, FedEx, UPS, Etc.)*

CTI/Boeing Tax Certification  
P.O. Box 747  
Andover, MA 01810  
*(If using regular post)*

**Please list your Vendor ID on all forms that are submitted in hard copy.**

**10) Q: I have completed the process but now I have an update. How do I provide this information?**

A: Re-enter the system by accessing the URL sent to you. Then re-enter the module to go through the tax interview again. If there has been change in circumstances you must first notify Boeing of these changes before you re-enter the tax module. In order for the information to be updated in the system, it is advised that you wait one to three days between notifying Boeing of the change and re-entering the Digital W-8 module. Notify Boeing of changes by sending an e-mail using this [template](#).

**11) Q: What is the purpose of the W-9 tax form?**

A: As a supplier to the Boeing Company, U.S. persons or companies are required to provide a completed Form W-9. You may complete your form electronically in the Digital W-8 module. Additionally, you can download a copy of the Form W-9 directly from the U.S. tax authority: <http://www.irs.gov/pub/irs-pdf/fw9.pdf>

**12) Q: What is the purpose of the W-8BEN (Certificate of Foreign Status of Beneficial Owner for United States Tax Withholding) tax form?**

A: If you are not a U.S. person and are seeking a reduced rate of withholding from the required 30% based on a treaty claim, you are required to provide the Boeing Company with a completed Form W-8 BEN. You may complete your form in the Digital W-8 module. Additionally, you can download a copy of the Form W-8BEN directly from the U.S. tax authority: [www.irs.gov/pub/irs-pdf/fw8ben.pdf](http://www.irs.gov/pub/irs-pdf/fw8ben.pdf). The instructions to the form can be found at: <http://www.irs.gov/pub/irs-pdf/iw8ben.pdf>. Without a completed Form W-8BEN, all payments to non-U.S. vendors will be subject to a required 30% U.S. withholding tax. To qualify for treaty relief you must reside in a country that has a bilateral income tax treaty with the U.S., and provide a valid Form W-8BEN including a U.S. Taxpayer ID Number and a properly completed treaty claim (Part II).

If you chose not to complete your certification online, please mail an original, hard copy of the form to the appropriate address below:

Compliance Technologies International, LLP  
Boeing Tax Certification  
200 Brickstone Square, Suite 403  
Andover, MA 01810  
*(If using a delivery service such as DHL, FedEx, UPS, Etc.)*

CTI/Boeing Tax Certification  
P.O. Box 747  
Andover, MA 01810  
*(If using regular post)*

If you have any questions, please email [10421099taxcertprocess@sps.boeing.com](mailto:10421099taxcertprocess@sps.boeing.com) and put the words "TAX-1042 question" in the subject line. Forms W-8BEN received by fax or email are not considered valid. To determine if you reside in an

eligible country, please see Publication 515 which can be viewed on the IRS website at: <http://www.irs.gov/pub/irs-pdf/p515.pdf>. Treaty tables are found on page 36 of Publication 515.

**13) Q: If we are a foreign company or individual, why do we need to obtain a U.S. taxpayer ID number?**

A: You need to obtain a U.S. tax ID number/Employer Identification Number (EIN) to qualify for any applicable tax treaty benefits. Without a U.S. Taxpayer ID Number, the Form W-8BEN or 8233 cannot be used to claim treaty benefits. The U.S. ITIN or EIN is a nine-digit number issued by the U.S. government.

**14) Q: If we are a non-U.S. business, how do we obtain a U.S. Employer Identification Number (EIN)?**

A: You can obtain a U.S. Employer Identification Number by completing the SS-4 Application form and submitting it to the U.S. Internal Revenue Services (IRS). Download a copy of Form SS-4 here: [www.irs.gov/pub/irs-pdf/fss4.pdf](http://www.irs.gov/pub/irs-pdf/fss4.pdf)

To complete this Form, fill out lines 1-5b, 7a-b (7b is optional), 8a, 8b-c (if applicable), 9a, 9b (if applicable) line 10, (check the box "compliance with IRS withholding regulations"), and 18.

To expedite the process, you should call the IRS Foreign Business Tax Line (open from 7am to 11:30pm ET) at (215) 516-6999. You will be required to provide the information completed on the Form SS-4. In most cases, the IRS should be able to provide the number immediately over the phone.

Alternatively, if you are not able to call the IRS Foreign Business Tax Line, you can fax a completed Form SS-4 to (215) 516-1040; the IRS will respond with a return fax in approximately one week. You must include a return fax number with your submission. If the Form SS-4 is sent by mail, then it will take at least four to five weeks for the IRS to respond to the request.

**15) Q: If I am a non-U.S. individual, how do I obtain a U.S. taxpayer ID number?**

Form SS-5, and can be downloaded from the Social Security website (<http://www.ssa.gov/online/ss-5.pdf>). If you are not eligible for an SSN, then you must obtain an Individual Taxpayer ID Number (ITIN), by filing Form W-7 with the IRS. The W-7 can be downloaded from the IRS website at: <http://www.irs.gov/pub/irs-pdf/fw7.pdf>

With the Form W-7, you must provide proof to the IRS you are not eligible for a SSN with a rejection letter from the Social Security Administration ("SSA") stating your ineligibility. You must send the IRS the completed Form W-7, the letter from SSA, and a letter from the Boeing Company stating that an ITIN is required to make payments to you at a reduced rate. Please email [10421099taxcertprocess@sps.boeing.com](mailto:10421099taxcertprocess@sps.boeing.com) with your full name and address if you are filing a Form W-7 stating that you will require this letter and put the words "TAX-1042 question" in the subject line. You will also be required to include a certified copy of one of the documents listed in page 3 of the Form W-7 instructions. Please exercise care with the certification of your document to ensure it meets the requirements listed in the Form W-7 instructions.

To complete the Form W-7 you must check box a, and complete the additional information for box a, above Line 1a. You must also complete line 1a, line 1b (if applicable), line 2, line 3 (if applicable), line 4 and 5, line 6a, 6b (if applicable), 6c (if applicable), 6d, and 6e and f (if applicable).

**16) Q: What if I am a non-U.S. vendor and I don't have a U.S. TIN but I would like to receive payments at a reduced rate?**

A: You may enter the Digital W-8 module and certify your non-U.S. status to be less the required 30% withholding tax. You may apply for a TIN at any time and once you receive the TIN you may re-enter the Digital W-8 and update your information. Payments from this point forward should be calculated using the reduced rate of withholding, if all information entered is valid. At the end of the year you will be provided a Form 1042-S that will evidence the amount paid and tax withheld. You may file a tax return with the U.S. Internal Revenue Service to reclaim any amount that is due.

**17) Q: How do I claim a reduced rate of withholding?**

A: If you are eligible for a treaty benefit, you will need to use a Form W-8BEN (paper or electronic), or, if you are an individual providing personal services, you will complete a paper Form 8233. You will always be required to provide a US Taxpayer ID Number in order to claim a treaty. On a paper Form W-8BEN you will be required to complete Lines 9a and 9c, and you may also be required to complete Line 10. Line 10 is only required if your claim requires more information than you provided in Lines 9a-e. For example, the instructions require that you complete Line 10 if you are claiming a treaty on

royalty income where your country's treaty has different tax rates for different types of royalties. If you are completing the Form W-8BEN electronically, you must carefully follow the instructions on each screen. If a Line 10 certification is required, you will be prompted for the certification and the system will provide the correct article numbers and tax rates for your claimed treaty country. Please be aware that your answers on these screens may be the difference between receiving a 30% rate of withholding, or a 0/5/8/10% rate of withholding, depending on your country's specific tax treaty with the IRS.