

Submitting Encrypted Documentation to CALS Business Services Process calsfs@cals.wisc.edu

When submitting information for a payment request that includes confidential information, such as a W9, email an encrypted PDF to calsfs@cals.wisc.edu

Important note: the email must be sent from a wisc.edu address and the attachment must not be an editable/fillable form. Also, no jpegs – please convert to a pdf. (See our process docs for both of these steps.)

Verify that the W9 is the [October 2018 IRS](#) version and that the W9 contains an actual signature – not a digital signature.

To create the email:

1. Create a new email window or select “Pop out” in the upper right of the email if it is a reply or forward. The subject line of the email should be “Name W9, W8, etc.” For example: “Fred Smith W9” or “Smith Farms W9.”
2. Select the “Options” tab, and then “Encrypt.”
3. Set the permission on the item and choose “UW-Madison – Confidential.”

