

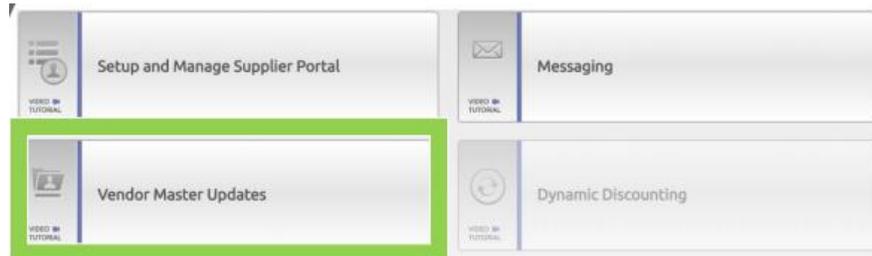
Invite a Payee Overview

This Quick Reference Guide (QRG) is designed to walk a **user** through the **Invite a Payee** process in our PaymentWorks supplier management portal. After checking to ensure that the desired payee has not already registered or been invited to register, you can send the desired supplier or individual payee an invitation to register in our PaymentWorks supplier management system.

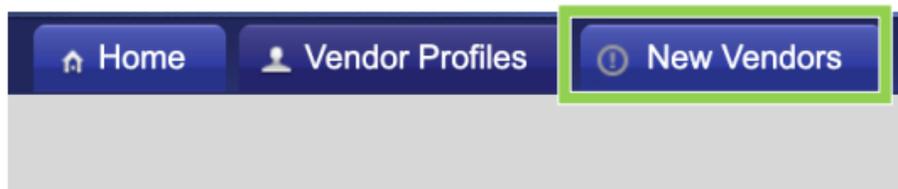
Procedure

Once logged into PaymentWorks:

1. Click on **Vendor Master Updates**.



2. Click on the **New Vendors** tab.



3. Click on the **Send Invitation** button.

Home Vendor Profiles

SHOW: Onboardings

VIDEO TUTORIAL

Filter Results:

Vendor Name:

Vendor #:

Contact E-Mail:

Invitation Approval:

Invitation Delivered:

Account Created:

Registration Form:

Source:

Invitation Initiator:

Clear Filters

Send Invitation...

4. The **Invite New Vendor** screen will appear.
 - a. Enter Supplier/Individual Name
 - b. Enter Contact Email Address
 - c. Enter Initiator's Department
 - d. Enter your phone number
 - e. Select if they are a supplier or an individual payee
 - f. Enter a personalized message to the payee, if desired.
 - g. When completed, click **Send**.

Invite New Vendor

Company/Individual Name*

Contact E-Mail*

Verify Contact E-Mail*

Initiator Department*

Initiator Phone Number*

*Required Field

Registration Form:

- Choose One -

- Choose One -

Supplier

Individual Payee

Personalized Message:

Cancel Send



The difference between a supplier and an individual payee:

- A supplier is a person or company providing goods or services to the University. We will procure these goods or services through a Purchase Order.
- An individual payee is a person receiving payment for:
 - Being a research participant
 - Non-employee individual seeking reimbursement
 - Non-employee individual to whom the university is providing a monetary gift
 - Non-employee individual receiving a royalty payment
 - Non-employee individual we are paying an honorarium
 - Individual that is a Pre/Post Doc Fellow or Grad student receiving a stipend

5. A confirmation that the invitation has been send will appear. Click **OK**
6. Here is a sample of the invitation that will be sent to the supplier/individual:

Sample Payee Invitation

Sample email that is sent to Payee after invitation is sent.

PaymentWorks

Dear Control Group:

Initiator has invited you to register as a new vendor to University of Virginia (Dev).

In order for University of Virginia (Dev) to establish you or your company as a payee or vendor, please [click here](#) to register on PaymentWorks, University of Virginia (Test)'s supplier portal.

Before you begin the registration process, be sure to have the following information available:

1. A valid tax ID (either an EIN or SSN)
2. If you wish to receive electronic (ACH) payments, you will need a copy of a voided check or bank statement.

If you have questions regarding billing, invoices, or payments, please contact University of Virginia (Test) directly.

If you have questions regarding the PaymentWorks platform or specific aspects of the registration process, please email support@paymentworks.com.

Thank you for your support.

Sincerely,

University of Virginia (Dev)

PaymentWorks The Business Identity Platform™

© 2020 PaymentWorks, Inc.

You have successfully completed this task.