

## Track Onboarding Status Overview

This Quick Reference Guide (QRG) is designed to walk a **user** through how to **Review the Invitation Status** of the registration invitation that was sent out to the supplier/individual payee.

## Procedure

Once logged into PaymentWorks:

1. Click on **Vendor Master Updates**



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



3. Under the **Filter Results** section, you can search for the payee via their email address or vendor name.

Home Vendor Profiles

SHOW: Onboardings

Filter Results:

Vendor Name:

Vendor ID:

Contact E-Mail:

Invitation Approval:

Invitation Delivered:

Account Created:

Registration Form:

Source:

Invitation Initiator:

Clear Filters

Send Invitation...

#### 4. Invitation Status:

- Pending Approval: Invitation is in queue to be reviewed.
- Opened: Payee has opened the invitation email.
- Clicked: Payee has received the invitation email and clicked on the link to get started.
- Rejected: UVA Supplier Manager has rejected the invitation request.
- Undeliverable: Invitation delivery was unsuccessful. This usually indicated the contact email address was invalid.
- Cancelled: The invitation has been cancelled.

#### 5. Account Status:

- No Account: Payee has not used their invitation to create their account.
- Registered: Payee account was created but not activated.
- Email Validated: Payee has created and activated their account.

#### 6. Registration Status:

- Not Started: Payee has not entered information on their registration.
- In Progress: Payee has started entering information on the registration but has not submitted.
- Submitted: Payee has submitted their registration.
- Returned: The registration has been returned to the payee in order for a correction to be made. The payee will be emailed directly with the requested correction. They will also receive a message in their “Messages” tab.
- Approved: The registration has been approved.
- Rejected: UVA Supplier Manager has rejected the registration.
- Complete: The payee has been notified of their approval, the vendor record has been created, and the vendor number has been issued. The vendor number will appear under “New Vendor Registration”.

- h. Processed: The registration has been processed and sent to your system of record.
7. When you see the vendor number under the New Vendor Registration column, this indicates the payee is available to use.



Home Vendor Profiles Updates New Vendors Reimbursements							
SHOW: Onboardings							
Filter Results:	VIDEO TUTORIAL	ONBOARD START	UPDATED	VENDOR NAME	INVITATION	VENDOR ACCOUNT	NEW VENDOR REGISTRATION
Vendor Name:		11/26/2019	11/26/2019	Registration Routing	Clicked	Email Validate	Complete Vendor #: 12349
		% COMPLETE					

You have successfully completed this task.