

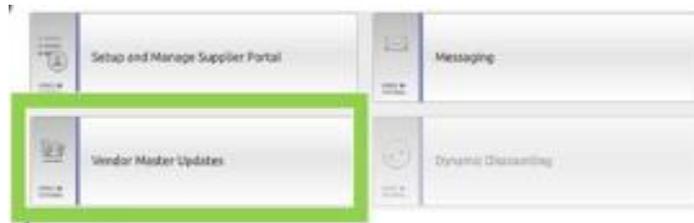
### Track Onboarding Status Overview

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.

The screenshot shows a web interface for tracking onboarding status. At the top, there are navigation links for 'Home' and 'Vendor Profiles'. Below that, a 'SHOW: Onboardings ?' button is visible. The main section is titled 'Filter Results:' and is highlighted with a green border. It contains three input fields: 'Vendor Name', 'Vendor ID', and 'Contact E-Mail'. Below the filter section, there are several dropdown menus for 'Invitation Approval', 'Invitation Delivered', 'Account Created', 'Registration Form', 'Source', and 'Invitation Initiator'. At the bottom of the filter section, there is a 'Clear Filters' button. Below the filter section, there is a 'Send Invitation...' button.

#### 4. Invitation Status:

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

#### 5. Account Status:

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

#### 6. Registration Status:

- a. Not Started: Payee has not entered information on their registration.
- b. In Progress: Payee has started entering information on the registration but has not submitted.
- c. Submitted: Payee has submitted their registration.
- d. 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.
- e. Approved: The registration has been approved.
- f. Rejected: UVA Supplier Manager has rejected the registration.
- g. 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.

ONBOARD START	UPDATED -	VENDOR NAME	INVITATION	VENDOR ACCOU	NEW VENDOR REGISTRATION	% COMPLETE
11/26/2019	11/26/2019	Registration Routing	Clicked	Email Validate	Complete Vendor #: 12349	<div style="width: 100%; height: 10px; background-color: blue;"></div>

You have successfully completed this task.