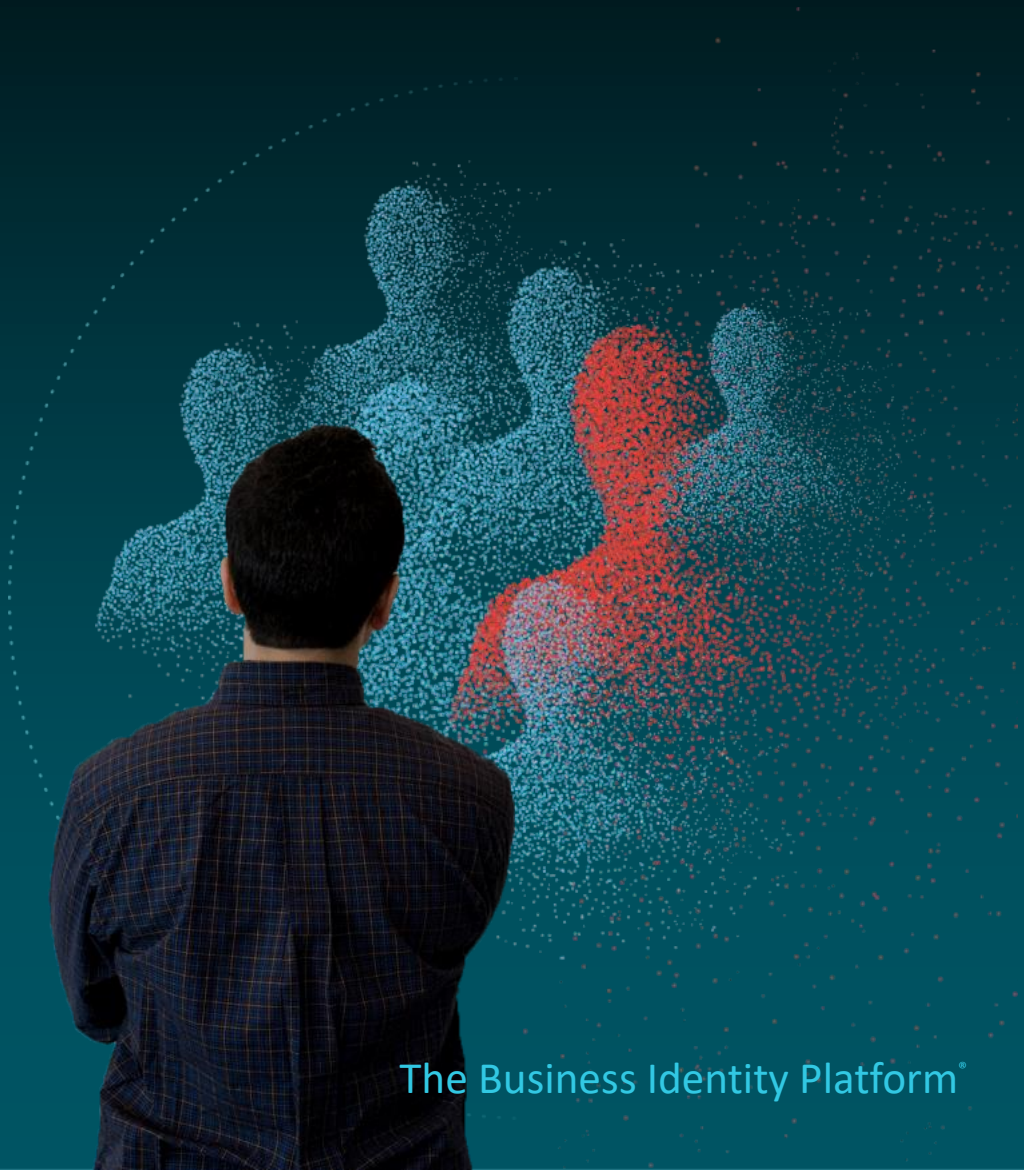


- Searching for a payee
- Inviting a Payee
- Review Invitation Status
- Track Onboarding



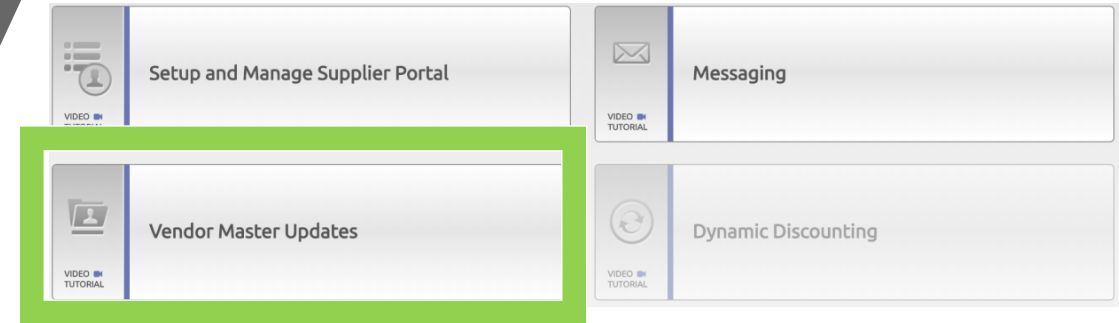
**Search for a
Payee**



Search For Payee

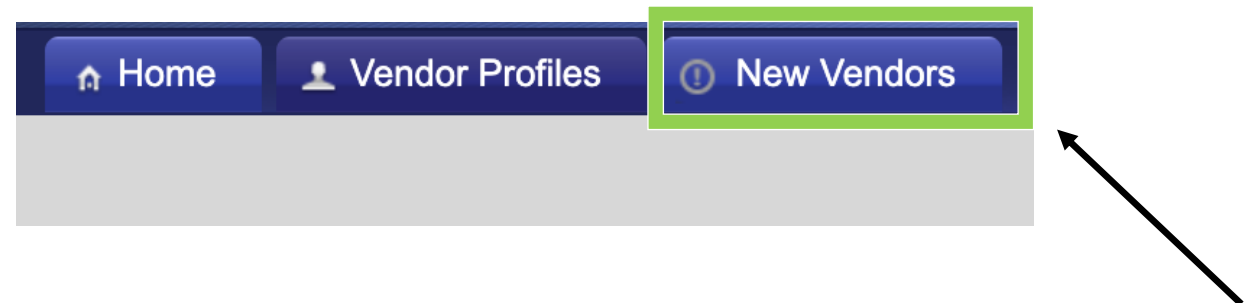
Step 1:

- Once logged into PaymentWorks, click on Vendor Master Updates.



Step 2:

- Next click on the New Vendors tab.



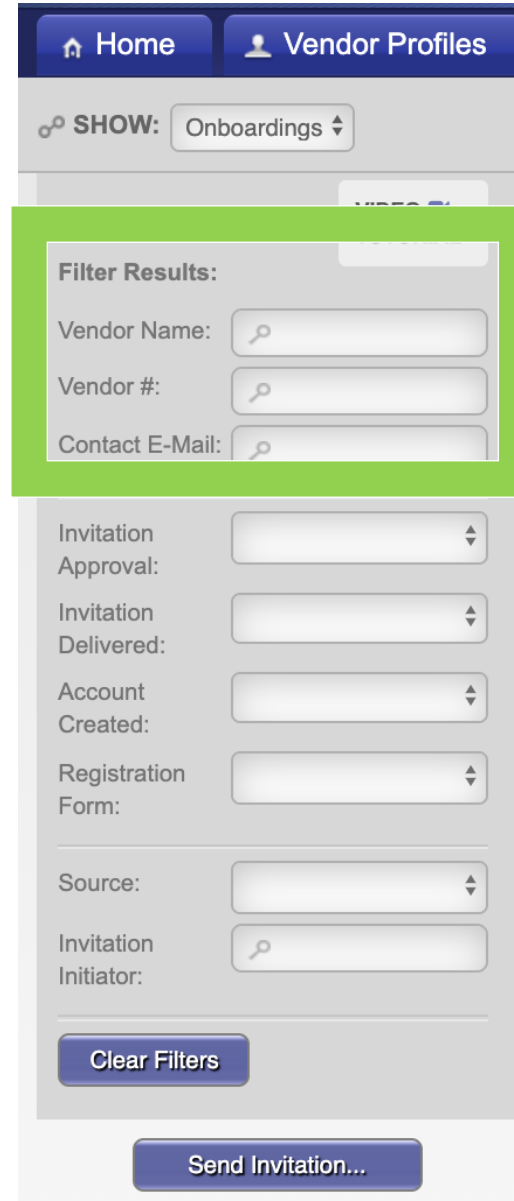
Search For Payee

Step 3:

- Under Filter Results, you can now search for the payee via their email address or vendor name.

Next Steps:

- This will bring up the request and provide you a status of it. If no results are found, you will need to invite the payee.



Home Vendor Profiles

SHOW: Onboardings

Filter Results:

Vendor Name:

Vendor #:

Contact E-Mail:

Invitation Approval:

Invitation Delivered:

Account Created:

Registration Form:

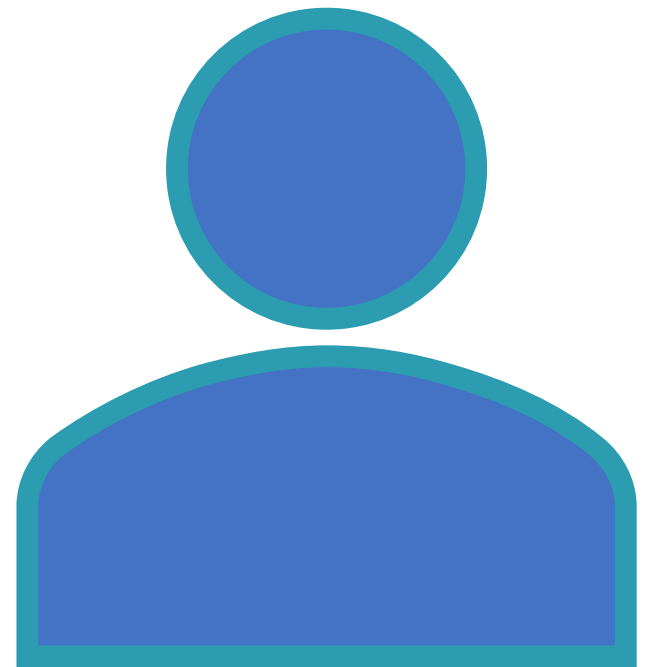
Source:

Invitation Initiator:

Clear Filters

Send Invitation...

Inviting a Payee



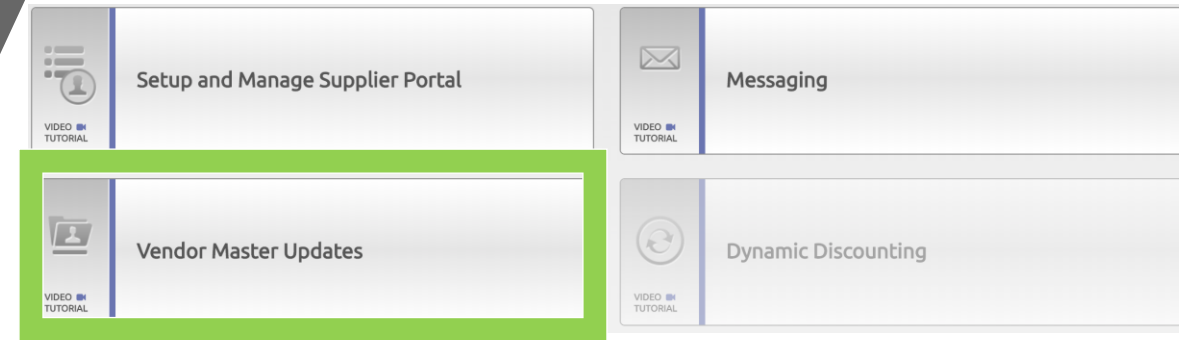
Invitation Process



Inviting a Payee

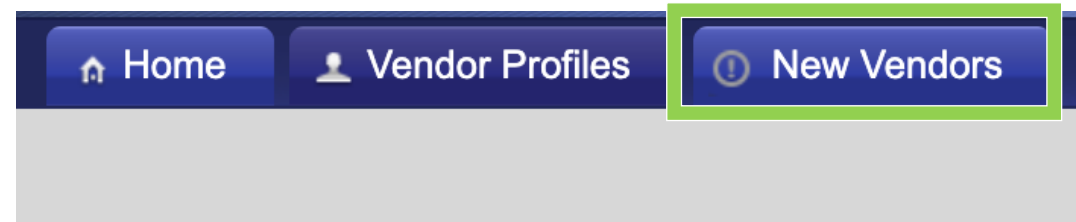
Step 1:

- Once logged into PaymentWorks, click on Vendor Master Updates.



Step 2:

- Next click on the New Vendors tab.



Inviting a Payee

Step 3:

- Click on 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

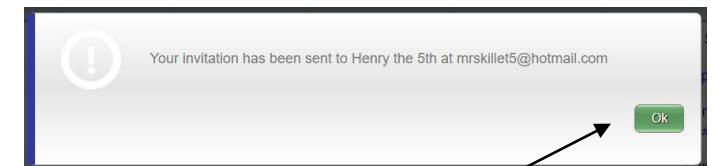
Send Invitation...

Inviting a Payee

Step 4:

- Invite screen will appear.
 - Enter Supplier Name/Individual Name
 - Contact email address, this email address must be used throughout the entire registration process.
 - Enter Initiator Department
 - Enter your phone number
 - Select if they are supplier/individual payee
 - Enter a personalized message to the payee (optional)
- A confirmation that the invitation has been sent will pop up, click "Ok".

The screenshot shows a web form titled "Invite New Vendor" with an envelope icon. The form contains several input fields: "Company/Individual Name:" (with a lock icon), "Contact E-Mail:" (with an asterisk), "Verify Contact E-Mail:" (with an asterisk), "Initiator Department:" (with an asterisk), and "Initiator Phone Number:" (with an asterisk). Below these fields is a "Registration Form:" section with a dropdown menu showing options: "- Choose One -", "- Choose One -", "Supplier" (highlighted in blue), and "Individual Payee". Below the dropdown is a "Personalized Message:" text area. At the bottom right of the form are "Cancel" and "Send" buttons. A red asterisk below the fields indicates "*Required Field".



Supplier/Individual Payee

How to know which to use in PaymentWorks

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

Sample Payee Invitation

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



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)

Registration Steps

Step 1:

- The payee will need to click on the link provided in the initiator's invitation. They will then be prompted to register with PaymentWorks.



University of Virginia (Dev)

Before registering as a new University of Virginia (Dev) supplier, you first need to create a free PaymentWorks account.

[Join Now](#)

Already registered on PaymentWorks? [Click here to login](#)

Registration Steps

Step 2:

- The payee will be asked to create an account by entering basic information. The email used to send the invite must be used to create the account. A different email CANNOT be used.

Step 3:

- Once the account has been created, the supplier/person will receive an additional email to verify their email address and complete the registration within 72 hours.

Payees (Suppliers) Join PaymentWorks for Free

Your Information

Create Password

I agree to the Terms of Service

Join Now

Registration Steps

Step 4:

- Once the email address has been confirmed, the payee will be able to fill out the new payee registration form.



Step 5:

- After completion, the payee will receive confirmation that the form has been submitted. The registration will be then be sent off to the Supplier Managers for review.

Your Full Name or DBA (doing business as) Business Name *

Enter your full name, or your business name as you would like it to appear on a check or other form of payment made out to you.

Telephone Number *

 (434) 555-1111 ext. 

Preferred Email *

Website

Description of Goods or Services

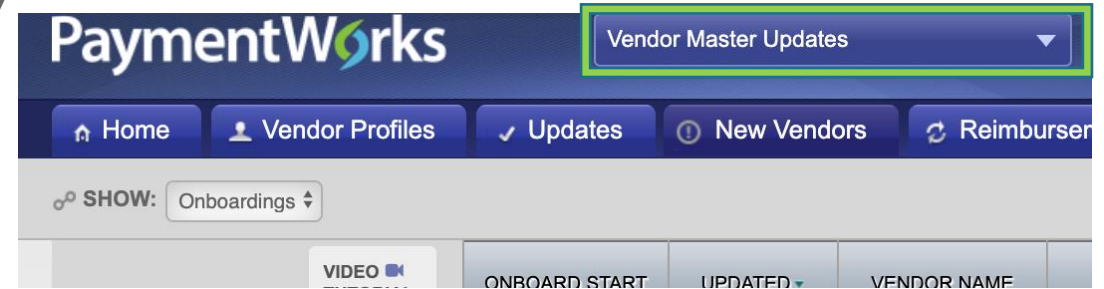


Review Invitation Status

Review Invite Status

Step 1:

- Confirm you are on the Vendor Master Updates page.



Step 2:

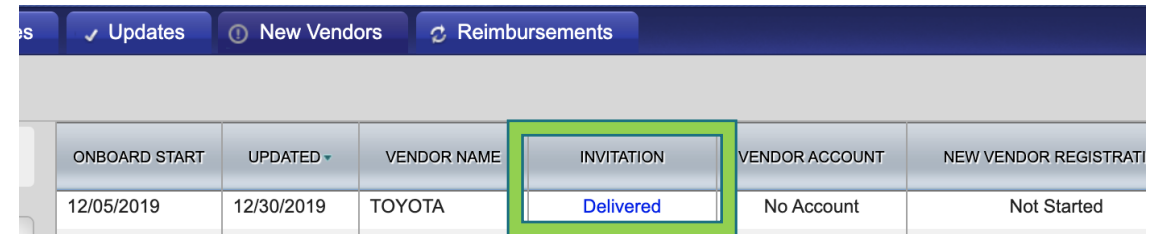
- Click on the New Vendors tab.



Review Invite Status

Step 3:

- Under column labeled “Invitation” you can review the status.



ONBOARD START	UPDATED	VENDOR NAME	INVITATION	VENDOR ACCOUNT	NEW VENDOR REGISTRATI
12/05/2019	12/30/2019	TOYOTA	Delivered	No Account	Not Started

A teal-colored ribbon graphic with a folded end on the right side, containing the text "Track Onboarding".

Track Onboarding

Tracking Onboarding

Home New Vendors

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...

ONBOARD START	UPDATED	VENDOR NAME	INVITATION	VENDOR ACCOUNT	NEW VENDOR REGISTRATION	% COMPLETE
04/22/2018	04/22/2018	Ashley Watson Laundry	Clicked	Email Validated	In Progress	<div style="width: 75%;"></div>

Invitation column:

- Pending Approval
- Opened
- Clicked
- Rejected
- Undeliverable
- Cancelled


Vendor Account Column:

- No Account
- Registered
- Email Validated

New Vendor Registration column:

- Not Started
- In Progress
- Submitted
- Returned
- Approved
- Rejected
- Complete
- Processed


- On the Vendor Master Updates page, click on the New Vendors tab.
- Here is where you can track the status for Payees.



Tracking Onboarding

Invitation Statuses

<u>Status</u>	<u>Explanation</u>
Pending Approval	Invitation is in queue to be reviewed.
Opened	Vendor has opened the invitation email.
Clicked	Vendor has received the invitation email and clicked on the link to get started.
Rejected	Buyer has rejected the invitation request.
Undeliverable	Invitation delivery was unsuccessful. This usually indicates the contact email address was invalid.
Cancelled	The invitation has been cancelled.



Tracking Onboarding

Account Statuses

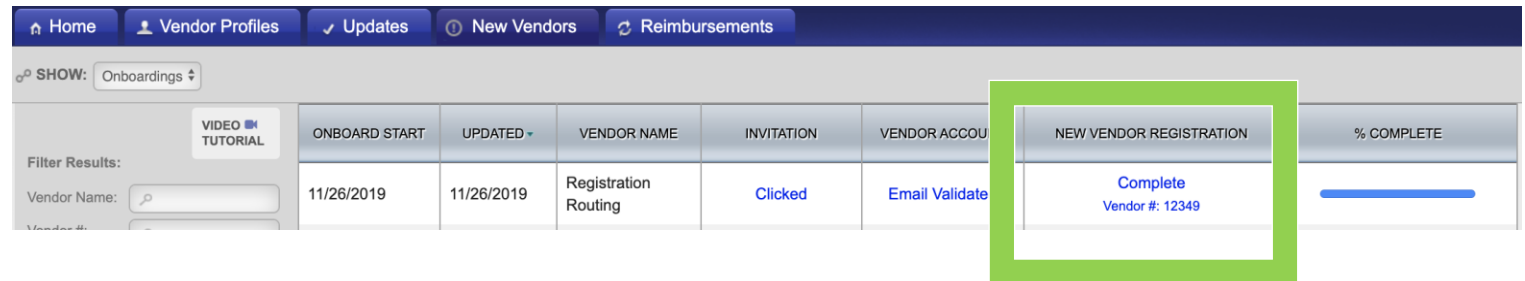
<u>Status</u>	<u>Explanation</u>
No Account	Vendor has not used their invitation to create their account.
Registered	Vendor account was created but not activated.
Email Validated	Vendor has created and activated their account.



Tracking Onboarding Registration Statuses

<u>Status</u>	<u>Explanation</u>
Not Started	Vendor has not entered information on their registration.
In Progress	Vendor has started entering information on the registration but has not submitted.
Submitted	Vendor has submitted their registration.
Returned	The registration has been returned to the vendor in order for a correction to be made. The vendor 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	Vendor has rejected the registration.
Complete	The vendor 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”.
Processed	The registration has been processed and sent to your system of record.

Tracking Onboarding



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%;"></div>

- When you see the Vendor# under the New Vendor Registration column, this indicates the Payee is available to use.

The image features a teal graphic composed of several overlapping rectangular shapes. On the left, there is a vertical rectangle. To its right, a larger horizontal rectangle overlaps it. The text "Online Help" is centered within this larger rectangle in a white, bold, sans-serif font. The overall design is clean and modern, using a consistent teal color palette.

Online Help

Online Help

Best Practice: When contacting support, remember to always start a new case

1. Click on the video tutorial button on the onboarding screen.
2. At the top right corner of the PaymentWorks screen, click "Help".
3. Click on the tile called "For Initiators" or type "initiator" in the search bar.

