PaymentWorks

- Searching for a payee

- Inviting a Payee

- Review Invitation Status

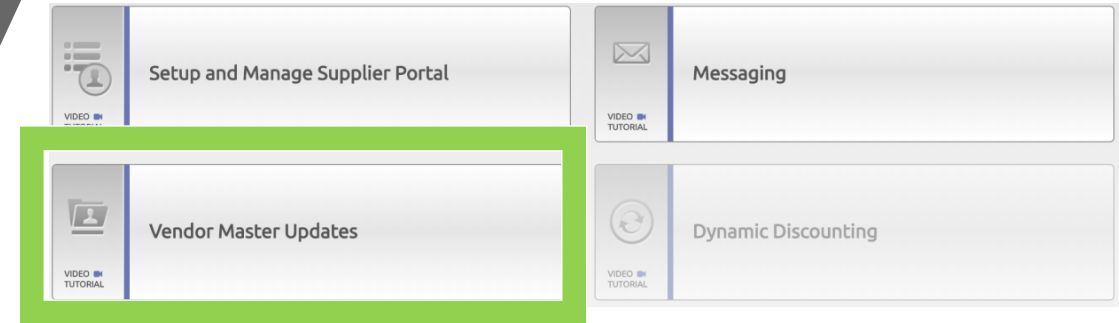- Track Onboarding

The Business Identity Platform®
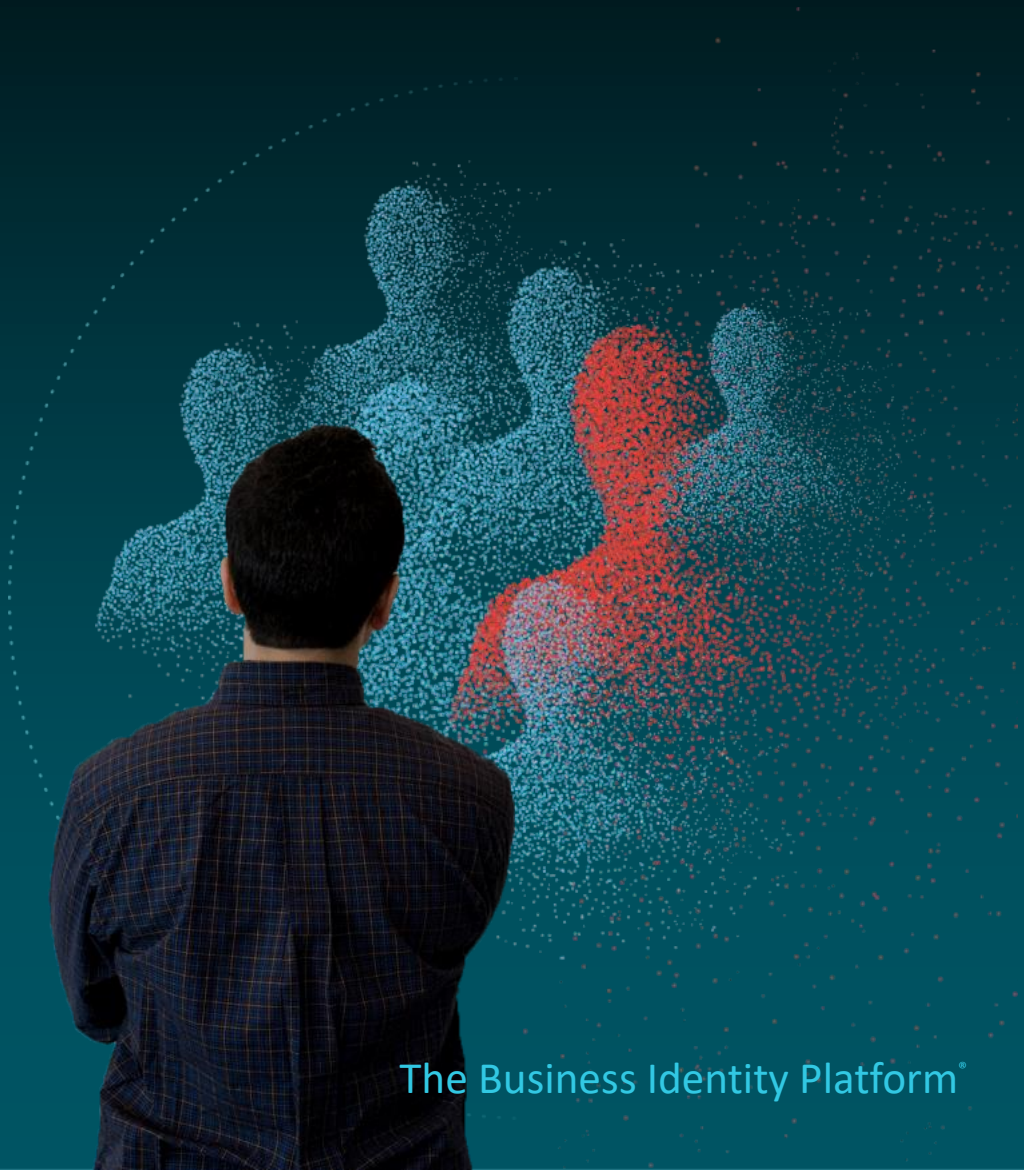
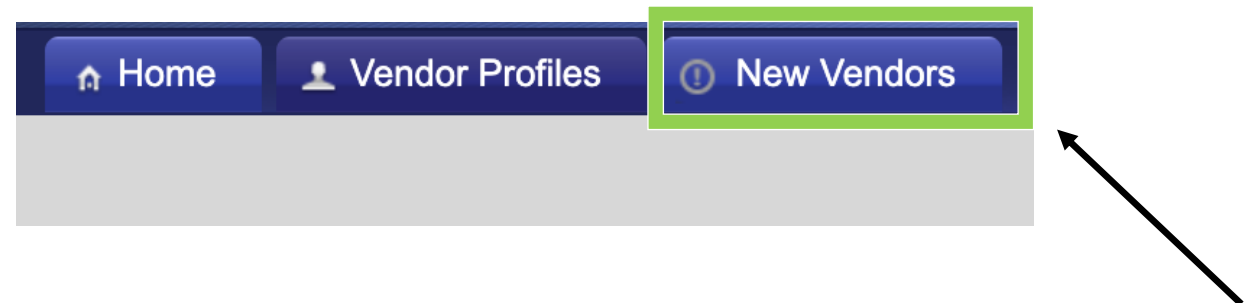Search for a Payee

Search For Payee

Step 1:

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

Step 2:

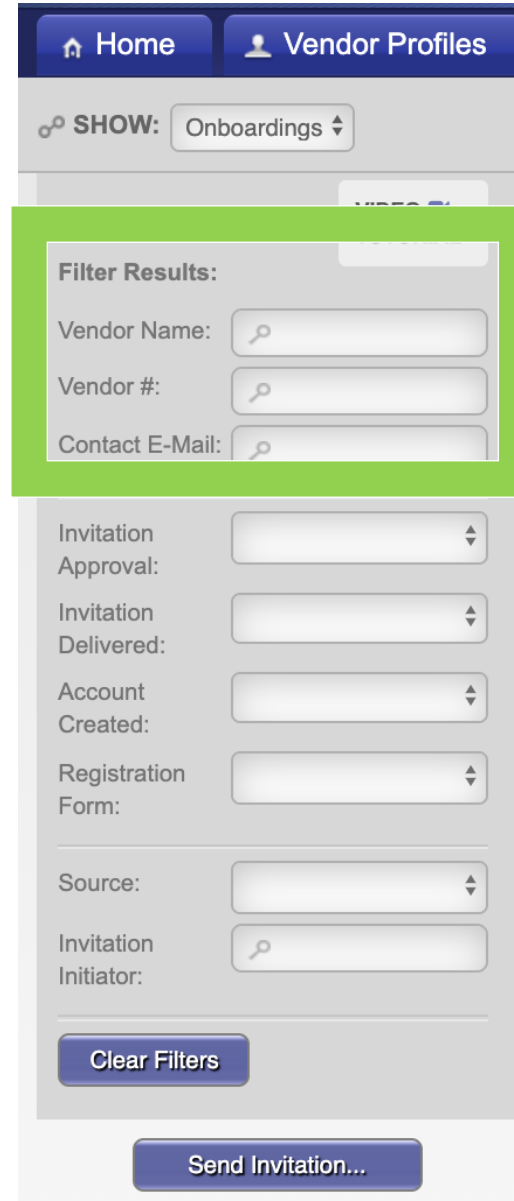- Next click on the New Vendors tab.

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.
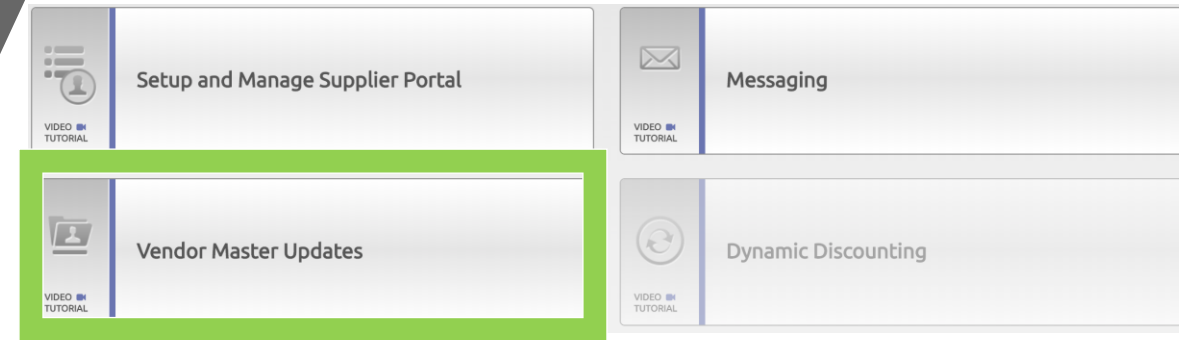
Inviting a Payee
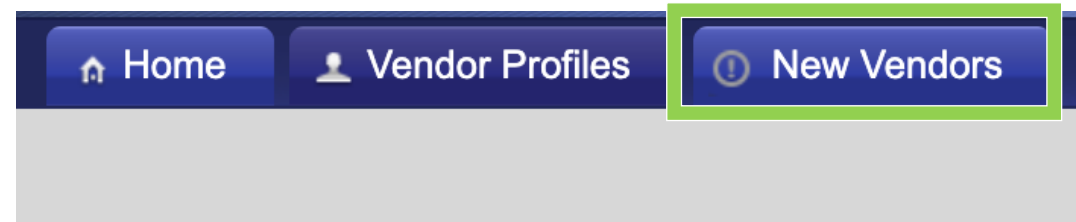
Invitation Process

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.

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".
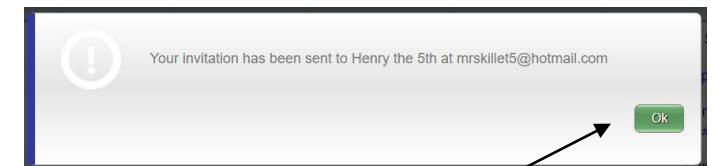
Supplier/Individual Payee

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.

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)

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 to verify their email address and complete the registration within 72 hours.

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
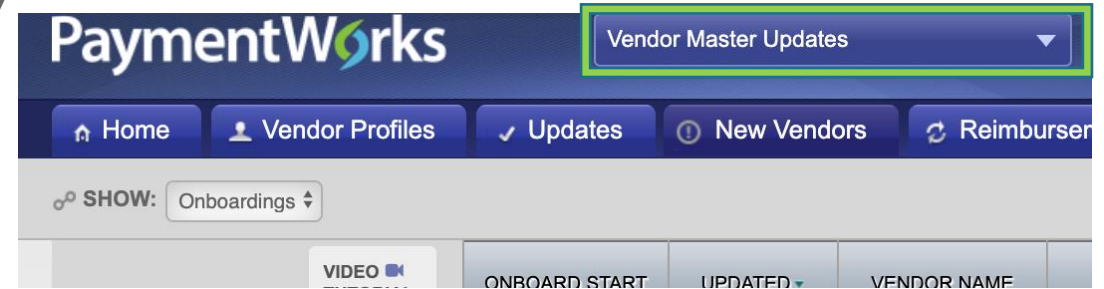
Description of Goods or Services

Review Invitation Status

Review Invite Status

Step 1:

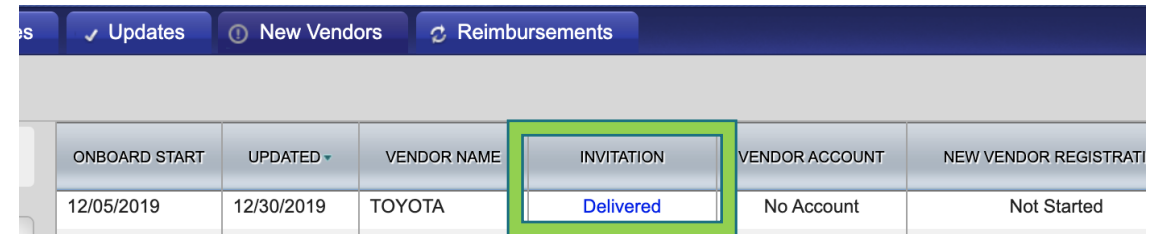- Confirm you are on the Vendor Master Updates page.

Step 2:

- Click on the New Vendors tab.

Review Invite Status

Step 3:

- Under column labeled "Invitation" you can review the status.

Tracking Onboarding

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

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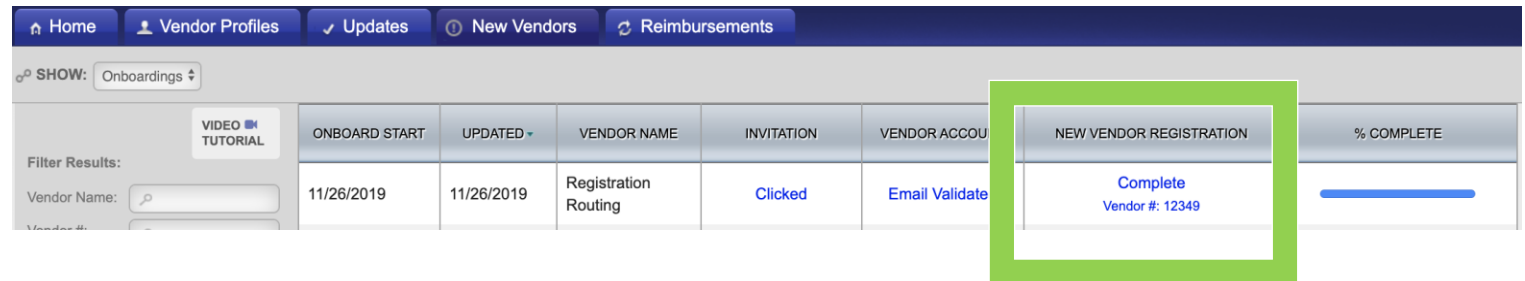
Status	Explanation
No Account	Vendor has not used their invitation to create their account.
Registered	Vendor account was created but not activated.
Email Validated	Vendor has created and activated their account.

Tracking Onboarding
Registration Statuses

Status	Explanation
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

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

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.