



## Wesleyan University Payee Onboarding Process via PaymentWorks

This job aid will cover the onboarding process for Payees partnering with Wesleyan University through the PaymentWorks application. This is specific to US Payees. A separate job aid is available for non US payees.

The specific processes covered in this job aid are:

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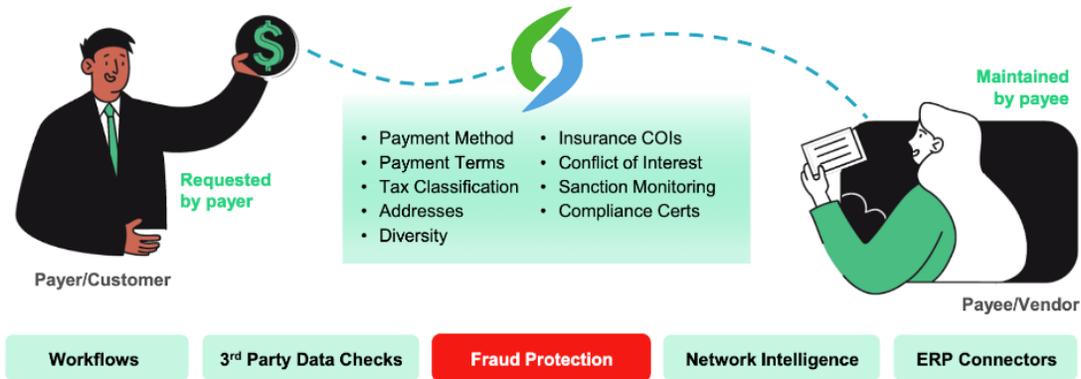
# PaymentWorks

## What is PaymentWorks

- PaymentWorks is the digital supplier onboarding platform that Wesleyan University uses to verify the identity and compliance of its payees. PaymentWorks offers an onboarding experience for secure, compliant and optimized business payments.
- For more information on how PaymentWorks is utilized, refer to the following resources:
  - [PaymentWorks Benefits to Suppliers](#)
  - [PaymentWorks: How does it work](#)

## The PaymentWorks Platform

Digital onboarding for secure, compliant and optimized business payments.



PaymentWorks



## Onboarding Process as a New Payee

If you are not yet a Wesleyan University vendor, you must be invited by a Wesleyan University employee to register as a new vendor via PaymentWorks. If you established a vendor relationship with Wesleyan University prior to the implementation of the PaymentWorks system, and your information is unchanged, you do not need to take any action. However, if you need to update any of your vendor information, you will need to be invited by Wesleyan University via PaymentWorks and complete the PaymentWorks onboarding process.

### Creating a PaymentWorks Account

You will receive an email invitation from [Wesleyan University] inviting you to create a PaymentWorks account and complete their New Vendor Registration form. If you are not the person within your organization who will complete and submit the request, you can forward the invitation email to a colleague prior to beginning account registration.

1. To start the process, click on the **Click Here** link in the invitation email to begin.

# PaymentWorks



Wesleyan University (Test) (via PaymentWorks) <invitations@paymentworks.com>  
to wesleyanpw25+test ▾



PaymentWorks

Dear Test Company:

[Redacted] has invited you to register as a new vendor to Wesleyan University (Test).

Please complete this invitation. Instruction on how to complete can be found here: [www.wesleyan.edu/finance/paymentprocessing](http://www.wesleyan.edu/finance/paymentprocessing).

In order for Wesleyan University (Test) to establish you or your company as a payee or vendor, please [click here](#) to register on PaymentWorks, Wesleyan University (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 Wesleyan University (Test) directly.

If you have questions regarding the PaymentWorks platform or specific aspects of the registration process, please review the help documentation or contact Support [here](#).

Thank you for your support.

Sincerely,

Wesleyan University (Test)

# PaymentWorks

If you are new to PaymentWorks you will be prompted to join the platform. If you already have a PaymentWorks account, but not yet connected to Wesleyan University, login to PaymentWorks. ([Understanding and Accessing Your New Vendor Registration Form](#))

2. Click **Join Now**
3. Complete all the required fields to create the PaymentWorks account.
4. Click to **agree to the Terms of Service** and **Join Now**

Payees (Suppliers)

## Join PaymentWorks for Free

### Your Information

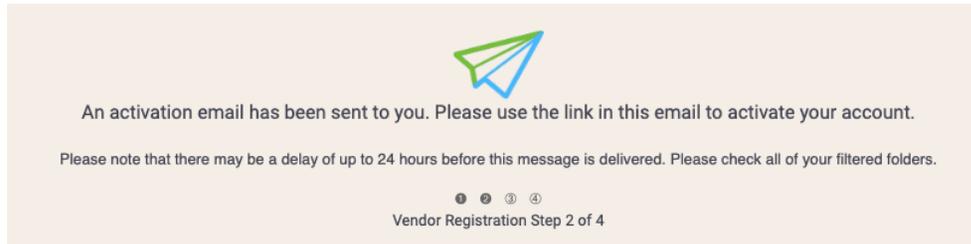
 

### Create Password

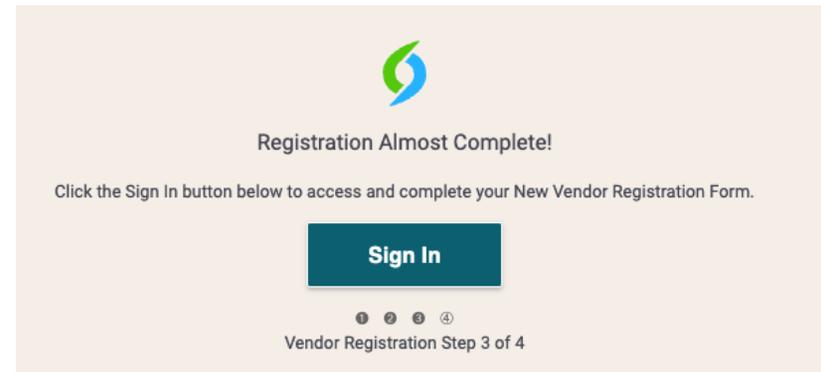
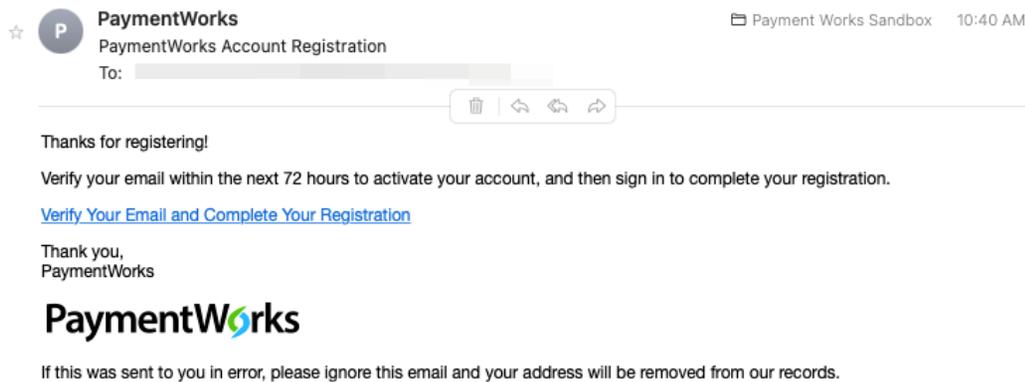
I agree to the [Terms of Service](#)

# PaymentWorks

Once you've created your account an activation email will be sent to activate your account and verify your email address.



- 5. From the verification email you receive, click **verify your email** and **complete your registration**
  - a. [Multi-Factor Authentication Resources](#)



6. Sign in with the login credentials set up during step three.

**Sign In**

Email

Password

**Sign In**

[Forgot password?](#)

[< Back](#)

## Multi-Factor Authentication

 An authentication code has been sent to XXX-XXX-4431

Authentication Code

**Confirm Code** [Resend code](#)

# PaymentWorks

The New Vendor Registration Welcome screen appears.

The screenshot shows the PaymentWorks interface. At the top left is the PaymentWorks logo. To its right is a 'Logout' link with an external link icon. Below the logo is a navigation bar with five items: 'Welcome' (highlighted with a blue background and a star icon), 'Tax Information' (with a document icon), 'Addresses' (with a house icon), 'Payment Information' (with a building icon), and 'Additional Information' (with a list icon). The main content area features the Wesleyan University logo (a red shield with a white 'W') and the text 'Wesleyan University (Test)' in a large blue font, followed by 'New Vendor Registration' in a smaller blue font. Below this, there is a 'Welcome' label followed by a greyed-out text box. The main text reads: 'In order to onboard as a new vendor, you will have to fill out and submit the following form to **Wesleyan University (Test)**.' and 'You will be notified by email when your application is processed.' At the bottom right, there are two buttons: 'Save and Exit' and a blue 'Next' button.

PaymentWorks [Logout](#)

Welcome Tax Information Addresses Payment Information Additional Information

  
**Wesleyan University (Test)**  
New Vendor Registration

Welcome

In order to onboard as a new vendor, you will have to fill out and submit the following form to **Wesleyan University (Test)**.

You will be notified by email when your application is processed.

[Save and Exit](#) [Next](#)

# PaymentWorks

Click the **Next** button to begin completing the New Vendor Registration form.

7. Complete all required fields in each section of the form and then click the **Next** button at the bottom of the form to move to the next section or click the tab at the top of the form to move to the appropriate section. When completing the PaymentWorks New Vendor Registration form, most of the requested information is standard for all customers who use PaymentWorks. In addition to this standard information, Wesleyan University requests additional information in the **Additional Information** section.

The screenshot shows the PaymentWorks interface. At the top left is the PaymentWorks logo. At the top right is a "Logout" link. Below the logo is a navigation bar with five tabs: "Welcome", "Tax Information" (which is highlighted), "Addresses", "Payment Information", and "Additional Information". The main content area is titled "Tax Information" and includes a note: "All fields marked with a red asterisk (\*) are required fields. All other fields are optional." The first question is "For tax purposes, which best describes you?\*" with two radio button options: "Individual or Sole Proprietorship" (selected) and "Corporation or other complex business entity". Below this is a "Country of Citizenship\*" dropdown menu with the text "(Country of Incorporation if using EIN)" and a selected option of "United States". The second question is "Are you using an SSN or EIN?\*" with no visible options. At the bottom left, a status bar says "Draft saved 8/21/2024, 10:57:57 AM". At the bottom right, there are two buttons: "Save and Exit" and "Next".

PaymentWorks [Logout](#)

Welcome Tax Information Addresses Payment Information Additional Information

## Tax Information

All fields marked with a red asterisk (\*) are required fields.  
All other fields are optional.

For tax purposes, which best describes you?\*

Individual or Sole Proprietorship  
 Corporation or other complex business entity

Country of Citizenship\*  
(Country of Incorporation if using EIN)

Select an Option  
United States

Are you using an SSN or EIN?\*

Draft saved 8/21/2024, 10:57:57 AM

Save and Exit Next

# PaymentWorks

Individual or Sole Proprietorship will prompt you for your country of citizenship. If it is something other than United States, please stop here and refer to the Payee Job Aid Wesleyan\_Foreign.

Are you using an SSN or EIN?

## **SSN**

SSN stands for Social Security Number. A Social Security Number (SSN) is a unique nine-digit number assigned by the Social Security Administration (SSA) to U.S. citizens, permanent residents, and temporary residents who are eligible to work in the U.S. Choosing this option will prompt for the legal name of the person to whom the SSN belongs and should be entered as it appears on the card.

## **EIN**

EIN stands for Employer Identification Number and is used to identify the tax accounts of employers and certain others who have no employees.

## **Generate Electronic W9**

An [IRS Form W-9](#) is required of every Wesleyan payee in order to certify to the Taxpayer Identification Number (either SSN or EIN) entered in the previous step. PaymentWorks provides the option of an electronic certification in this next step. If you prefer to upload a pdf copy simply click “no” and you will be given the option to upload a file. Note: if you do not do either of these the registration form will be sent back. Wesleyan cannot setup a supplier for payment without a W-9 form.

Additional instructions on how to complete a W-9 can be found [here](#).

## Generate Electronic W-9\*

When you use PaymentWorks, we will create an IRS form W-9 for you automatically, unless you opt out. Electronic W-9's are convenient for you and provide enhanced security for your information. You may wish to opt-out of electronic W-9 generation if you have any exemptions (Section 4) or specific signature requirements (see instructions on page 4 and 5 of the W-9).

- Yes
- No

### Form W-9 Certifications

You have chosen to submit your Form W-9 electronically. Please confirm the following certifications:

#### Tax ID Type

- The Tax ID number shown on this form is my correct taxpayer identification number

#### Backup Withholding

I am not subject to backup withholding because:  
(a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue

- Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding.

#### Citizenship

- I am a U.S. citizen or other U.S. person

## Personal Information

Enter additional information here. The Preferred Email will be used for any remittance information related to electronic payments. If you are an agent representing another person for the performance of services, please note that information in the Description of Goods or Services. Additional information may be required of the ultimate beneficiary of the payment.

### Personal Information

All fields marked with a red asterisk (\*) are required fields.

All other fields are optional.

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\*

Please provide a phone number that is directly associated with your business. This should be a main line, office line, or other verifiable business contact number. We may use this phone number to contact you.

Preferred Email\*

Website

Description of Goods or Services

## Completing Address Information

Enter a primary address information as well as remittance information for payments.

## Completing Payment Information

A domestic **entity** will offer the following payment types

### Payment Information

All fields marked with a red asterisk (\*) are required fields.

All other fields are optional.

#### Bank Location Country

Select an Option

United States

#### Select a Payment Method and Term

##### Credit Card

Term: Pay on Approval

Please contact Accounts Payable at [aphelp@wesleyan.edu](mailto:aphelp@wesleyan.edu) to sign-up and for more information regarding payment by credit card.

##### ACH/Direct Deposit

Term: Net 30

##### Check

Term: Net 30

##### Wire to Domestic Bank

Term: Net 30

# PaymentWorks

Wesleyan prefers to pay via credit card and this is the fastest way to receive payment. This is facilitated but a Single Use Account number and needs to be set up by emailing [aphelp@wesleyan.edu](mailto:aphelp@wesleyan.edu). The next preferred way is ACH/Direct Deposit. If the banking information cannot be independently verified then payment will be made via check to the remittance address. Wire to Domestic Bank should only be chosen on an exception basis.

A US *individual* will be offered the following:

## Payment Information

All fields marked with a red asterisk (\*) are required fields.

All other fields are optional.

Bank Location Country

Select an Option

United States

Select a Payment Method and Term

ACH/Direct Deposit

Term: Net 30

Check

Term: Net 30

Wire to Domestic Bank

Term: Net 30

Concourse Digital Payment

Term: Net 30

# PaymentWorks

Concourse Digital Payment is facilitated through JP Morgan. Contact Accounts Payable at [aphelp@wesleyan.edu](mailto:aphelp@wesleyan.edu) for additional information.

The Banking information section will only appear if you select ACH or Wire as your Payment Method. When entering bank account information for electronic payments, the following is required.

1. Bank Account is open and active
2. Bank account can receive electronic payments
3. The routing number corresponds with the payment type selected
4. The correct account numbers are entered on the form and the information matches the bank validation file

**As part of the registration process vendors may receive a phone call from PaymentWorks to review the information you have submitted.**

## Completing Additional Information

### Supplier Category

Please indicate the applicable category. U.S. Individuals and Entities will be prompted to indicate the purpose of the payment for [Form 1099](#) reporting.

# Additional Information

All fields marked with a red asterisk (\*) are required fields.

All other fields are optional.



Supplier Category\*

Select an Option

US Entity

## 1099 Tax Information for Entities

Is your company being paid for any of the following?\*

- Royalties or broker payments in lieu of dividends or tax-exempt interest
- Rents
- Services performed by someone who is not your employee
- Prizes and awards
- Other income payments
- Medical and healthcare payments
- Crop insurance proceeds
- Cash payments for fish (or other aquatic life) you purchase from anyone engaged in the trade or business of catching fish
- Cash paid from a notional principal contract to an individual or partnership or estate
- Payments to an attorney
- Any fishing boat proceeds
- Nonemployee compensation (self-employment income)
- None of these statements are true

# PaymentWorks

Some common examples related to Wesleyan:

- If you are an agent representing a performer or some other type of service, please check “Services performed by someone who is not your employee”.
- If you are a speaker or performer visiting campus for a limited engagement, please check “Nonemployee compensation (self-employment income).”
- If you are being paid for the sale of goods, check “Other income payments”.

## Insurance

If you are being paid under Wesleyan’s [Master Purchase Agreement](#) please provide the applicable insurance information and certificate. If you are contracting for a limited engagement you can answer “no” to this question.

## Accounts Receivable and Sales Contact Information

Accounts Receivable information will be used for any questions related to billing. Sales Contact information will be used for questions related to the goods and services provided.

## Conflict of Interest

Wesleyan University is required to review and disclose potential conflicts of interest in various internal and external reporting. Additional information can be found [here](#).

## Submitting the New Vendor Registration Form

After entering all required fields, click the **Submit** button. After Wesleyan University approves your new vendor registration, you will be notified via email.



**Submission Successful!**

Your new vendor registration has been submitted successfully to Hartford HealthCare Corporation (Test).

As part of your registration process you **may** receive a phone call from PaymentWorks to review information you have submitted.

You will receive an email notification when your application has been approved.

Please note - this is not an authorization to perform services.

[Give Us Your Feedback](#)

[Go to your dashboard](#)

**Important Note:** If your new vendor registration is returned by Wesleyan, you will need to ensure the requested updates are made and resubmit the form for approval.

## Tracking Your Vendor Onboarding Status

You can track the status of your registration with Wesleyan University and other customers you may have registered for using PaymentWorks by [logging into your PaymentWorks account](#).

Home

My Payee Profile

Customers

Invoices

Remittances

News

Messages

Account

## Home

### Customers

View your customers and pending registrations

Customer	Registration Submission Date ↓	Status
Wesleyan University (Test)	03/08/2025	<span>✓ Connected</span> <a href="#">View/Edit Form</a>

Rows per page: 5 Total Rows: 1 < >

[Go to Customers](#)

Your onboarding status appears on the **Home** or **Customers** page.

## Updating your Payee Profile

After you have submitted your New Vendor Registration form, your Payee profile will be created. Within the My Payee profile section, business and personal information can be updated as needed.

1. To update your Payee Profile, login to your PaymentWorks account and click My Payee Profile on the left Panel.

2. Click the appropriate info box to update:
  - a. Primary Information – Basic contact information
  - b. Legal Entity Information – Tax details such as Tax Country, Tax Identification Number, and Classification
  - c. Tax Forms – Upload or update any required tax documents
  - d. Banking Accounts – Add or update your banking information. Click [here](#) for more details on adding Bank Accounts.
  - e. Addresses & Bank Accounts – Manage the Remittance Addresses and/or Order Addresses where Wesleyan University can submit payments and associate bank accounts.

**My Payee Profile** [?](#)

Information in your profile is shared with your connected customers. [Go to the Classic Company Profile Page](#)

### Primary Information - Jennifer Aniston

**Primary Contact Info**  
23498 1/2 E Lincoln Ave  
Reedley, CA  
93654-9434 US  
telephone: (508) 816-0864  
email: samantha.michaels+aniston@paymentworks.com

[View or Edit Details](#)

### Legal Entity Information

**Tax Details**  
Legal Name: Jennifer Aniston  
Country: US  
Tax Identification Number: \*\*\*\*-2633 [?](#)  
Tax Class: C Corporation

✔ Tax Identification Valid

[View or Edit Details](#)

### Bank Accounts

No bank accounts available.

[+ Add Account](#)

### Tax Forms

Download File on Record [?](#)

[View or Edit Details](#)

### Addresses & Bank Accounts

[+ Add Address](#)

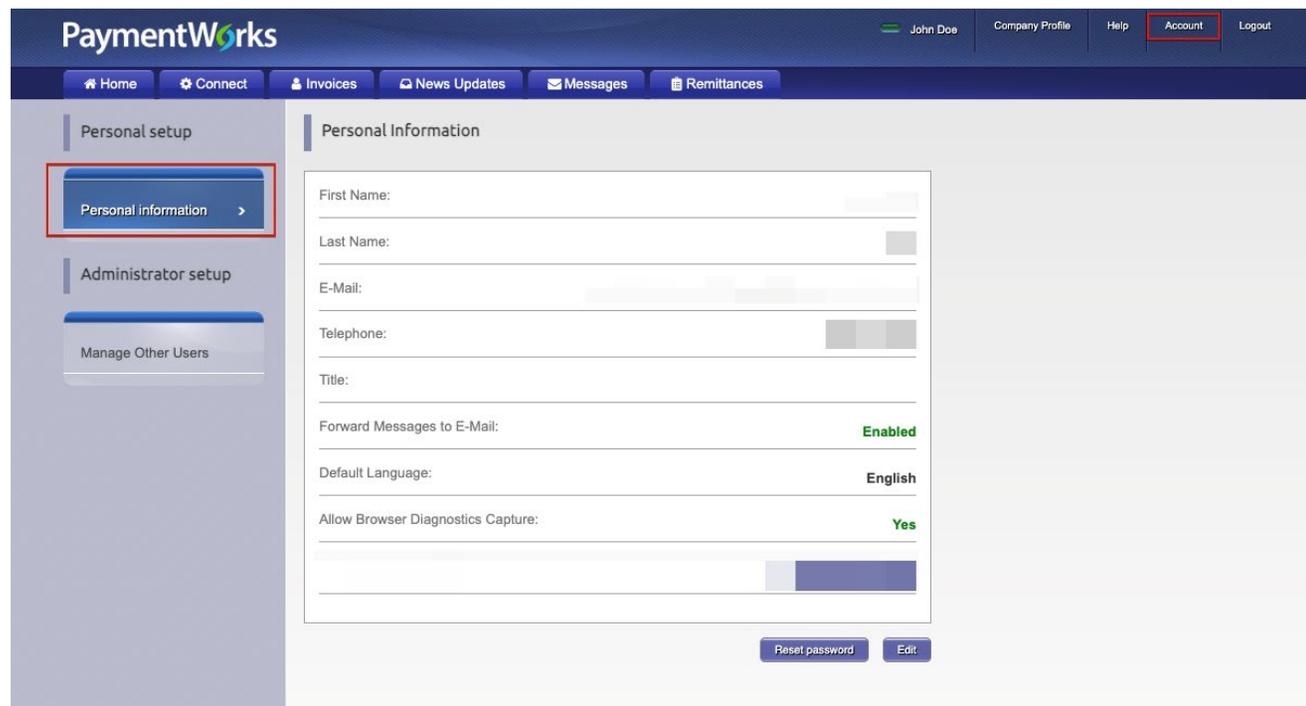
Location Name	Address Type	Address	Bank Account
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## Updating Your Account Information

Your account information contains your Personal Information, including your Email address and Telephone number, which may differ from that in the Company Profile. It is also where you would reset your password, if needed.

Your account telephone number is used for Multi-factor Authentication when you log-in to your account. **If you need to update your Telephone number, do so before your old telephone number becomes unavailable.** If you are unable to access PaymentWorks due to an unavailable, inactive, or out of date telephone number, contact [PaymentWorks Customer Support](#).

To update your Personal Information, login to your PaymentWorks account and click the **Profile** icon with your initials in the top right and select **Manage Account**.



The screenshot displays the PaymentWorks user interface. At the top, the logo is on the left, and the user's name 'John Doe' is on the right. Below the logo, a navigation bar contains 'Home', 'Connect', 'Invoices', 'News Updates', 'Messages', and 'Remittances'. In the top right corner, there are links for 'Company Profile', 'Help', 'Account' (highlighted with a red box), and 'Logout'. The main content area is divided into two sections: 'Personal setup' on the left and 'Personal Information' on the right. Under 'Personal setup', 'Personal information' is highlighted with a red box and a right-pointing arrow. Below it are 'Administrator setup' and 'Manage Other Users'. The 'Personal Information' section contains a form with the following fields: 'First Name:', 'Last Name:', 'E-Mail:', 'Telephone:', and 'Title:'. Below these are three toggle switches: 'Forward Messages to E-Mail:' (set to 'Enabled'), 'Default Language:' (set to 'English'), and 'Allow Browser Diagnostics Capture:' (set to 'Yes'). At the bottom of the form are two buttons: 'Reset password' and 'Edit'.



## Updating Wesleyan University's Specific Information

PaymentWorks can be used by vendors to manage multiple vendor customers. As a PaymentWorks vendor, you may need to manage information specific to Wesleyan University that does not apply for your other customer(s).

1. Login to your PaymentWorks Account and navigate to **Home** or **Customers** pages to view your Customers.
2. Click the **View/Edit Form** link for Wesleyan University. The form will appear and navigate to the Payment Information tab to update Payment Method and/or the **Additional Information** tab to update Wesleyan University specific questions.

## Home

**Customers**  
View your customers and pending registrations

Customer	Registration Submission Date	Status	
[blurred]	[blurred]	<input type="radio"/> Registration Not Started	<a href="#">Start Registration</a>
[blurred]	[blurred]	<input type="radio"/> Registration Not Started	<a href="#">Start Registration</a>
[blurred]	[blurred]	<input type="radio"/> Registration Not Started	<a href="#">Start Registration</a>
[blurred]	[blurred]	<input checked="" type="checkbox"/> Connected	<a href="#">View/Edit Form</a>
[blurred]	[blurred]	<input checked="" type="checkbox"/> Connected	<a href="#">View/Edit Form</a>

Rows per page: 5 Total Rows: 5 < >

[Go to Customers](#)



## Payee Resources

- If you have questions regarding the PaymentWorks platform or the PaymentWorks registration process, you can search for articles on the [PaymentWorks Support Center](#) or contact [PaymentWorks Support](#).
  - [Invitations & Customer Registrations](#)
  - [Payments & Invoices](#)
  - [Updating your Account](#)
- For any questions regarding Wesleyan's specific vendor management process, please contact [aphelp@wesleyan.edu](mailto:aphelp@wesleyan.edu)