



## Wesleyan University Payee Onboarding Process via PaymentWorks

This help document will cover the onboarding process for Payees partnering with Wesleyan University through the PaymentWorks application. This is specific to Non U.S. Payees. A separate help document is available for U.S. 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

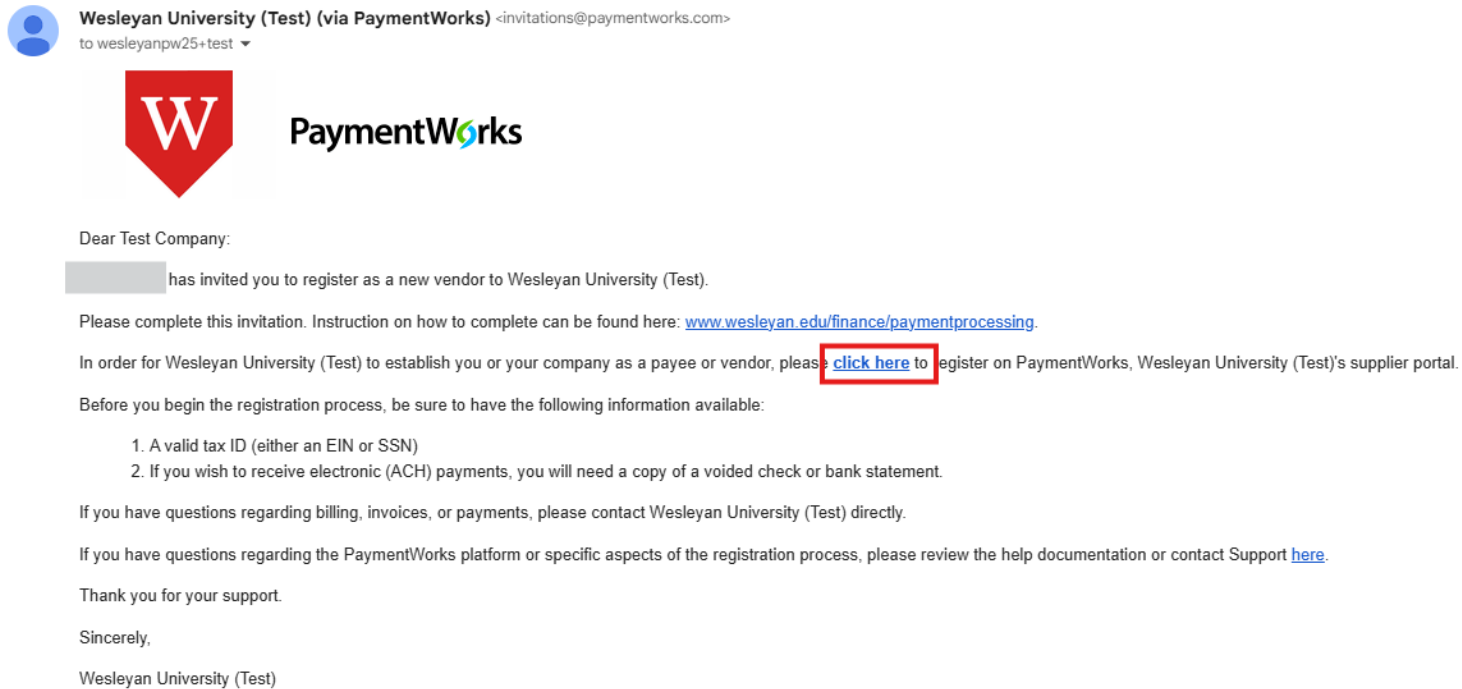
# PaymentWorks

## Onboarding Process as a New Payee

### 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.



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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

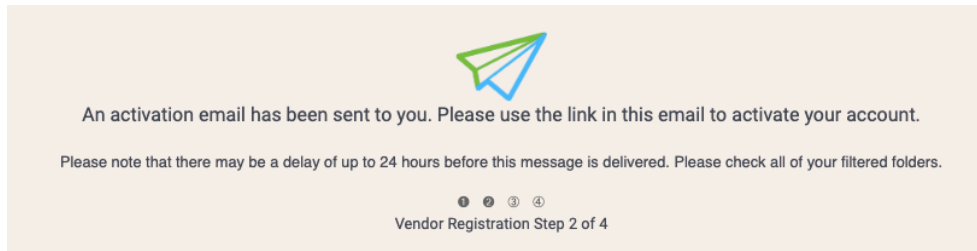
### Your Information

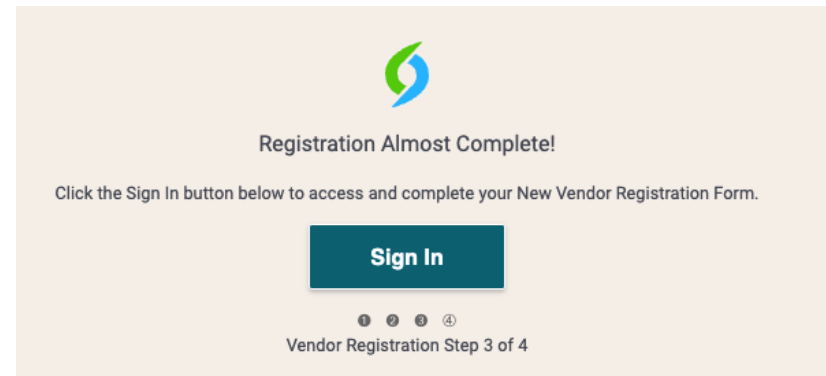
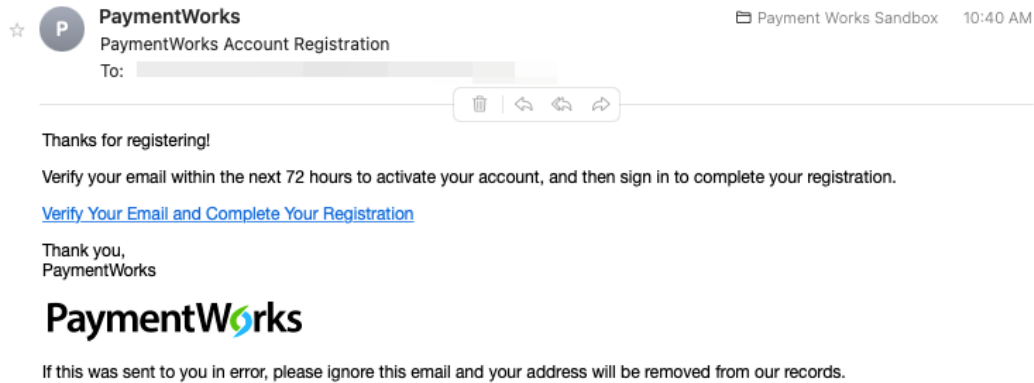
### Create Password

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

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](#)



The New Vendor Registration Welcome screen appears.



## Wesleyan University (Test)

New Vendor Registration

Welcome [redacted]

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](#)

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

# PaymentWorks

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. To the right is a "Logout" link. Below the logo is a navigation bar with five tabs: "Welcome", "Tax Information" (which is highlighted in blue), "Addresses", "Payment Information", and "Additional Information". A red box highlights this navigation bar. Below the navigation bar is the "Tax Information" section. The section title is "Tax Information". Below the title are two lines of text: "All fields marked with a red asterisk (\*) are required fields." and "All other fields are optional." The main 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\*" field with a dropdown menu showing "United States" and the text "(Country of Incorporation if using EIN)". Below the dropdown is another question: "Are you using an SSN or EIN?\*" At the bottom left, there is a "Draft saved 8/21/2024, 10:57:57 AM" message. At the bottom right, there are two buttons: "Save and Exit" and "Next". A red box highlights both buttons.

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 your country of citizenship is the United States, please stop here and refer to the help document Wesleyan\_U.S..

## **TIN Type**

TIN stands for [Taxpayer Identification Number](#).

## **SSN**

SSN stands for US Social Security Number. A US 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.

## **ITIN**

ITIN stands for Individual Taxpayer Identification Number. This is a tax processing number available for certain nonresidents and resident aliens. You will need a number in order to file tax returns or claim tax treaty benefits.

## **Non US Tax ID**

As a foreign individual or entity, you are not required to have a number in order to register with Wesleyan. However, depending on the tax situation, you may be required to obtain a number when filing taxes at the end of the year. The IRS provides an [interactive tax assistant](#) tool to determine eligibility. If you do not have a number at this point, choose "Non US Tax ID" and continue the registration. Depending on the type of payment you are receiving from Wesleyan, we may need to collect additional information via [Sprintax Calculus](#) in order to ensure tax compliance.

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## W-8BEN or W-9

This IRS form is required of every Wesleyan payee in order to certify to the Taxpayer Identification Number (either SSN or EIN) entered in the previous step.

If you know you are a resident alien for tax purposes based upon your [tax residency status](#), you can upload the [form W-9](#). Otherwise, the Form W-8 is required. There are different types of W-8 Forms described [here](#). Foreign individuals would most likely complete the W-8BEN (linked in the PaymentWorks page for convenience). However, entities should complete the [W-8BEN-E](#), or other applicable form linked on [our page](#), and upload separately.

## 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 as well as remittance information for payments.

## Completing Payment Information

A foreign individual 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  
Thailand

Select a Payment Method and Term

Check  
Term: Net 30

Wire Transfer  
Term: Net 30

Save and Exit    Next

Wesleyan is only able to wire in US Dollars, even if it is to an International Bank. If we cannot independently verify the banking information, the payment will be issued by check to the remittance address on file.



The Banking information section will only appear if you select 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 or Wesleyan staff to review the information you have submitted.**

## Completing Additional Information

### Supplier Category

Please indicate the applicable category of Non-U.S. Entity or Individual.

### 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](#).



The screenshot shows the PaymentWorks interface. On the left is a navigation menu with items: Home (selected), My Payee Profile, Customers, Invoices, Remittances, News, Messages, and Account. The main content area is titled 'Home' and contains a 'Customers' section with the subtitle 'View your customers and pending registrations'. Below this is a table with columns: Customer, Registration Submission Date (with a downward arrow), and Status. The table contains one row for 'Wesleyan University (Test)' with a registration date of '03/08/2025' and a status of 'Connected' (indicated by a green box with a checkmark). A 'View/Edit Form' link is visible next to the status. At the bottom right of the table area, it says 'Rows per page: 5' and 'Total Rows: 1'. A blue button labeled 'Go to Customers' is located at the bottom right of the page.

Your onboarding status appears on the **Home** or **Customers** page. This may have one of the following statuses:

- Not Started – Supplier has created a PaymentWorks account but not yet started the specific Wesleyan process.
- In Progress – Supplier has started the Wesleyan process but not yet submitted.
- Submitted/Pending Review – Form is pending review from Wesleyan.
- Returned – Form has been returned and pending additional information.
- Connected – Ready to use.

## 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

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- 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.

PaymentWorks JA

[Home](#) [My Payee Profile](#) [Customers](#) [Invoices](#) [Remittances](#) [News](#) [Messages](#) [Account](#)

## 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.

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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 right, the 'Account' menu item is highlighted with a red box. In the left sidebar, the 'Personal Information' option is also highlighted with a red box. The main content area shows the 'Personal Information' form with the following fields and values:

Field	Value
First Name:	
Last Name:	
E-Mail:	
Telephone:	
Title:	
Forward Messages to E-Mail:	Enabled
Default Language:	English
Allow Browser Diagnostics Capture:	Yes

At the bottom of the form, there 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).

# PaymentWorks

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	
[Redacted]	[Redacted]	<input type="radio"/> Registration Not Started	<a href="#">Start Registration</a>
[Redacted]	[Redacted]	<input type="radio"/> Registration Not Started	<a href="#">Start Registration</a>
[Redacted]	[Redacted]	<input type="radio"/> Registration Not Started	<a href="#">Start Registration</a>
[Redacted]	[Redacted]	<input checked="" type="radio"/> Connected	<a href="#">View/Edit Form</a>
[Redacted]	[Redacted]	<input checked="" type="radio"/> 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)