PaymentWorks

PURDUE RESEARCH FOUNDATION

Purdue Research Foundation
Payee Onboarding Process via PaymentWorks

This job aid will cover the onboarding process for Payees partnering with Purdue Research Foundation (PRF) through the PaymentWorks application. The specific processes covered in this job aid are:

PaymentWorks

What is PaymentWorks

- PaymentWorks (PW) is the digital supplier onboarding platform that Purdue Research Foundation (PRF) 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.

Requested by payer

- Payment Method
- Payment Terms
- Tax Classification
- Addresses
- Diversity
- Insurance COIs
- Conflict of Interest
- Sanction Monitoring
- Compliance Certs

Maintained by payee

Payer/Customer

Payee/Vendor

| Workflows | 3rd Party Data Checks | Fraud Protection | Network Intelligence | ERP Connectors |

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Onboarding Process as a New Payee

If you are not yet a Purdue Research Foundation vendor, you must be invited by a PRF employee to register as a new vendor via PaymentWorks. If you established a vendor relationship with PRF 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 PRF via PaymentWorks, and complete the PaymentWorks onboarding process.

Creating a PaymentWorks Account

You will receive an email invitation from PRF 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.

Dear ▮▮▮▮▮▮

▮▮▮▮▮▮ has invited you to register as a new vendor to Purdue Research Foundation (Test).

As discussed, please fill out the Vendor Registration Packet. Thanks!

In order for Purdue Research Foundation (Test) to establish you or your company as a payee or vendor, please click here to register on PaymentWorks, Purdue Research Foundation (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 Purdue Research Foundation (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,

Purdue Research Foundation (Test)

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 Purdue Research Foundation, login to PaymentWorks. ([Understanding and Accessing your New Vendor Registration Form](#))

2. Click **Join Now**

Purdue Research Foundation (Test)

Before registering as a new Purdue Research Foundation (Test) supplier, you first need to create a free PaymentWorks account.

Join Now

Already registered on PaymentWorks? Click here to login

PaymentWorks

Complete all the required fields to create the PaymentWorks account.

3. Click to **agree to the Terms of Service** and **Join Now**

Payees (Suppliers)

Join PaymentWorks for Free

Your Information

First Name

.

Company Name / Doing Business As (optional)

Title

🇺🇸 ▾ Telephone

Email

Confirm Email

Create Password

Password

Confirm password

☐ I agree to the Terms of Service

Join Now

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

An activation email has been sent to you. Please use the link in this email to activate your account.

Please note that there may be a delay of up to 24 hours before this message is delivered. Please check all of your filtered folders.

① ❷ ③ ④
Vendor Registration Step 2 of 4
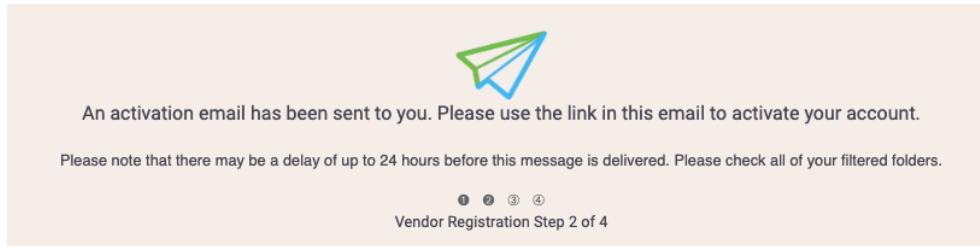
4. From the verification email you receive, click **verify your email** and **complete your registration**
   a. Multi-Factor Authentication Resources

PaymentWorks
PaymentWorks Account Registration
📁 Payment Works Sandbox   10:40 AM
To:

Thanks for registering!

Verify your email within the next 72 hours to activate your account, and then sign in to complete your registration.

Verify Your Email and Complete Your Registration

Thank you,
PaymentWorks

PaymentWorks

If this was sent to you in error, please ignore this email and your address will be removed from our records.

Registration Almost Complete!

Click the Sign In button below to access and complete your New Vendor Registration Form.

Sign In

① ❷ ❸ ④
Vendor Registration Step 3 of 4

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5. 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

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The New Vendor Registration Welcome screen appears. Click the **Next** button to begin completing the New Vendor Registration form.

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✦ Welcome	▣ Tax Information	🏠 Addresses	🏛 Payment Information	📄 Additional Information

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Purdue Research Foundation (Test)
New Vendor Registration

Welcome, Purdue Pete!

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

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

Save and Exit   **Next**

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6. 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, Purdue Research Foundation requests additional information in the **Additional Information** section.

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?*
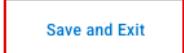
💾 Draft saved 8/21/2024, 10:57:57 AM   Save and Exit   Next

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Completing Payment Information

The Banking information section will only appear if you select ACH as your Payment Method (or Wire for non-domestic vendors who do not have a US bank). 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.

Submitting the New Vendor Registration Form

After entering all required fields, click the **Submit** button. After Purdue Research Foundation 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 PRF, 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 PRF and other customers you may have registered for using PaymentWorks by logging into your PaymentWorks account.

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

Updating Your Company Profile

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

1. To update your Company Profile, login to your PaymentWorks account and click the **Profile** icon with your initials in the top right and select **Company Profile**.

2. Click the appropriate tab from the left side to update:
   a. Marketing Information – Basic information such as Company Name (DBA) and contact information.
   b. Business Details – Tax information such as Tax Country, Tax Identification Number, and Classification
   c. Tax Forms – Upload or update any required tax documents
   d. Order and Remittance Addresses – Manage the Order and/or Remittance Addresses where PRF can submit payments. The Bank Accounts tab does not appear if no Remittance Address is indicated.
   e. Banking Accounts – Add or update your banking information. Click here for more details on adding Bank Accounts.
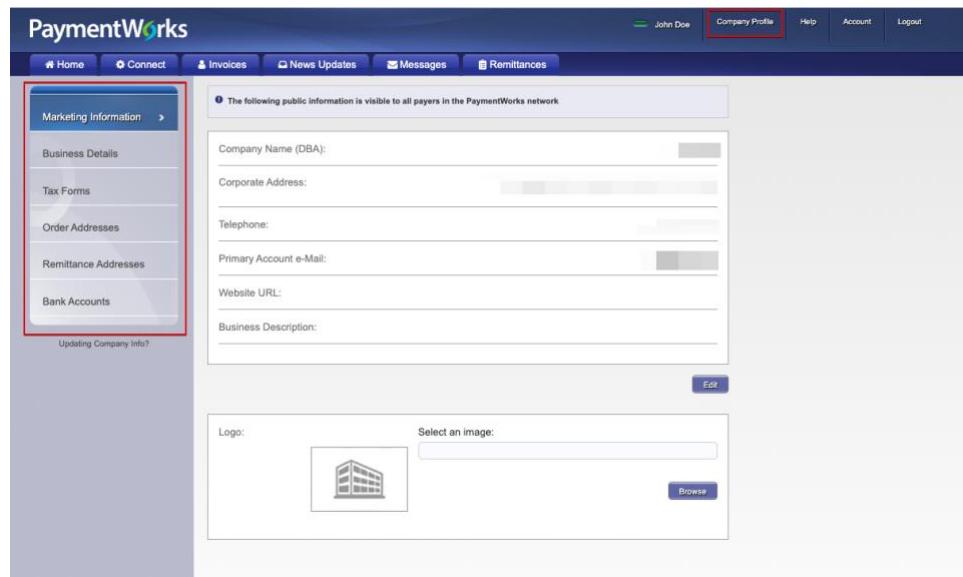
Updating Your Account Information

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 available.** 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.**

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Updating Purdue Research Foundation Specific Information

As a PaymentWorks vendor, you may need to manage information specific to Purdue Research Foundation 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 Purdue Research Foundation. The form will appear and navigate to the Payment Information tab to update Payment Method and/or the **Additional Information** tab to update Purdue Research Foundation specific questions.

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Payee Resources
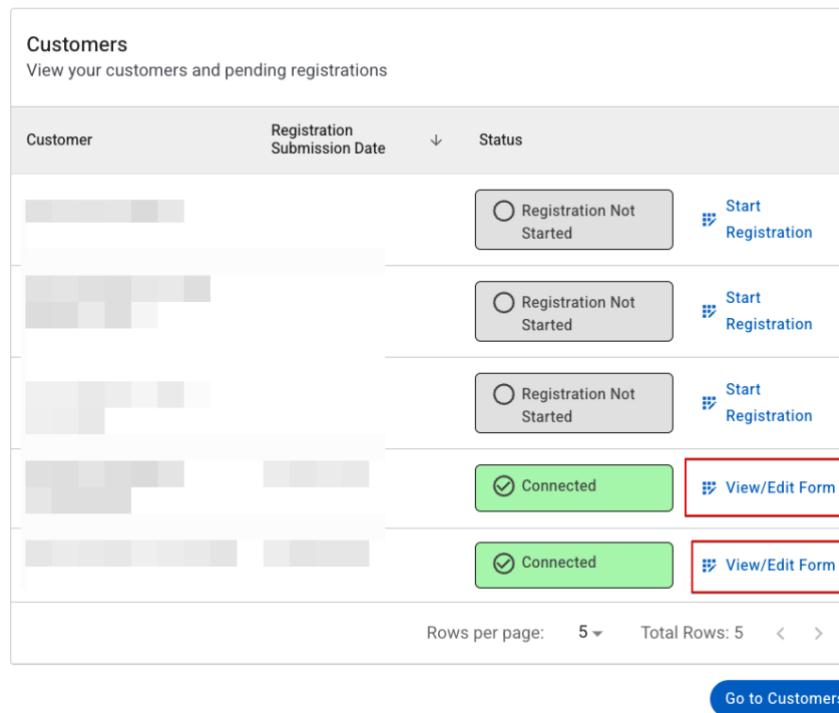
- If you have questions regarding the PaymentWorks platform or the PaymentWorks registration process, you can search for articles on the PaymentWorks Knowledge Base or contact PaymentWorks Support.
    - Account Login & Updates
    - Invitations & Customer Registrations
    - Invoices & Payments
- For any questions regarding Purdue Research Foundation's specific vendor management process, please contact prf-ap@prf.org.