



# 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:

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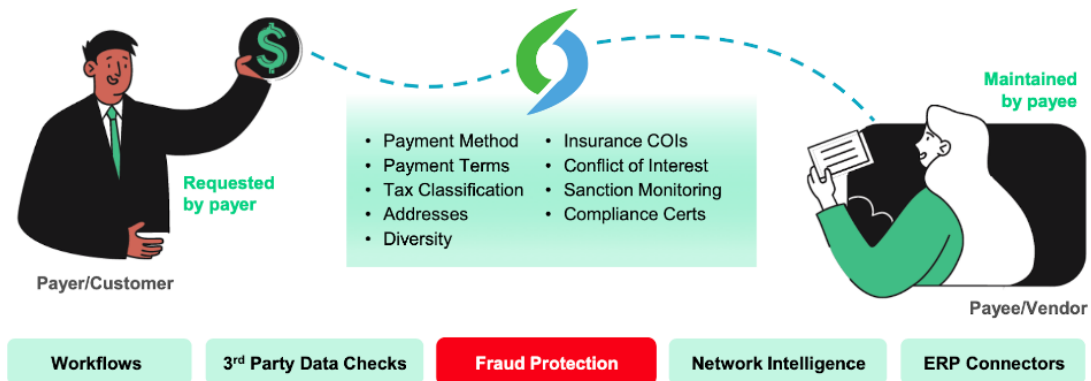
# PaymentWorks

## 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.



PaymentWorks



## 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 [REDACTED]

[REDACTED] 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)

# 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 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](#)



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	.
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Company Name / Doing Business As (optional)

Title

 Telephone

Email

Confirm Email

### Create Password

Password

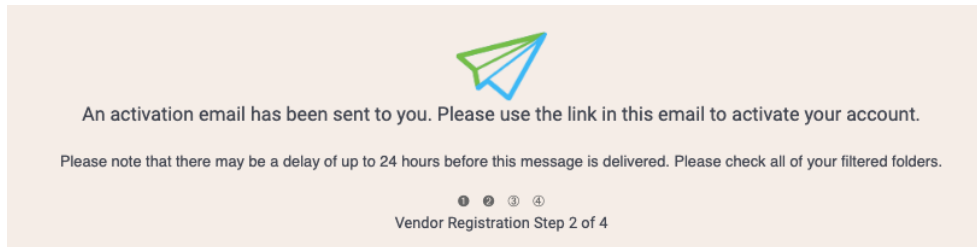
Confirm password

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

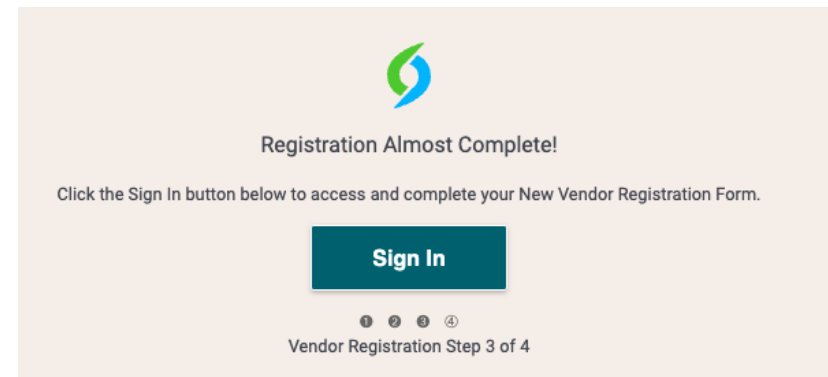
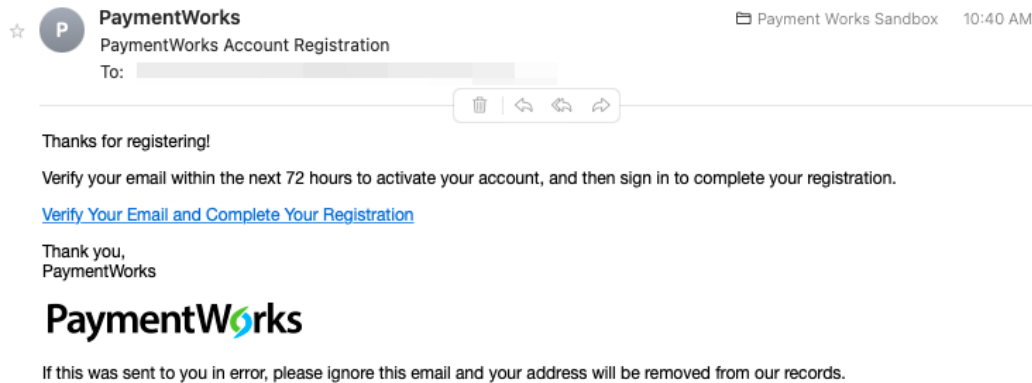
**Join Now**

# PaymentWorks

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



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



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](#)

# PaymentWorks

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

## PaymentWorks

[Logout](#)

Welcome

Tax Information

Addresses

Payment Information

Additional Information



## 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](#)

# PaymentWorks

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



## 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.

The screenshot shows the PaymentWorks Home dashboard. On the left is a navigation sidebar with links for Home, My Payee Profile, Customers, Invoices, Remittances, News, Messages, and Account. The main content area is titled 'Home' and contains two primary sections: 'Customers' and 'Invoices'. The 'Customers' section displays a table with columns for Customer, Registration Submission Date, and Status. One customer is listed: 'Purdue Research Foundation (Test)' with a registration date of '12/08/2025' and a status of 'Connected'. A 'View/Edit Form' link is available for this entry. Below the table are pagination controls showing 'Rows per page: 5' and 'Total Rows: 1'. A 'Go to Customers' button is located below the table. The 'Invoices' section displays a table with columns for Customer, Invoice Number, Invoice Date, Invoice Amount, Paid Amount, Purchase Order, Invoice Status, and Scheduled Pay Date. A message states 'There are no invoices to view. Check your filters and confirm you have connected customers.' with an 'Invoice Help' link. Below this table are pagination controls showing 'Rows per page: 5' and 'Total Rows: 0'. A 'Go to Invoices' button is located below the table. On the right side of the dashboard, there is a 'PaymentWorks News' section with a title 'Next Gen Remittances and Filtering Updates' and a 'Read More' link. A 'Return To PaymentWorks Classic' button is located in the bottom left corner of the dashboard area.

PaymentWorks

Home

My Payee Profile

Customers

Invoices

Remittances

News

Messages

Account

### Home

#### Customers

View your customers and pending registrations

Customer	Registration Submission Date ↓	Status
Purdue Research Foundation (Test)	12/08/2025	Connected <a href="#">View/Edit Form</a>

Rows per page: 5 Total Rows: 1

[Go to Customers](#)

#### Invoices

View your connected customer-uploaded invoices

Customer	Invoice Number	Invoice Date ↓	Invoice Amount	Paid Amount	Purchase Order	Invoice Status	Scheduled Pay Date
There are no invoices to view. Check your filters and confirm you have connected customers. <a href="#">Invoice Help</a>							

Rows per page: 5 Total Rows: 0

[Go to Invoices](#)

#### PaymentWorks News

1 of 2 Articles < >

##### Next Gen Remittances and Filtering Updates

PaymentWorks continues to deliver modern UI enhancements to our Payee Portal interface. Now available, Remittances page and filter features. You can now view your payment remittances all from Next Gen without having to go back to the Classic...

April 04, 2024

[Read More](#)

Return To PaymentWorks Classic

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.

The screenshot shows the PaymentWorks user interface. At the top, the user is logged in as John Doe, and the 'Company Profile' tab is selected. The left sidebar contains a menu with 'Marketing Information' highlighted. The main content area displays a form for updating company information. The form includes the following fields: Company Name (DBA), Corporate Address, Telephone, Primary Account e-Mail, Website URL, and Business Description. Below these fields is an 'Edit' button. At the bottom of the form, there is a 'Logo' section with a placeholder image and a 'Select an image' field with a 'Browse' button. A note at the top of the form states: 'The following public information is visible to all payers in the PaymentWorks network'.

## 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 right, the 'Account' menu item is highlighted with a red box. The left sidebar shows 'Personal information' also highlighted with a red box. The main content area is titled 'Personal Information' and contains a form with the following fields and options:

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

At the bottom of the form, there are two buttons: 'Reset password' and 'Edit'.

## 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.

### 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 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](mailto:prf-ap@prf.org).