

This guide is for those from business entities or those who are sole proprietors who must be onboarded or registered as a Columbia supplier via PaymentWorks.

For individuals receiving payments, refer to Registering as a Vendor for Individuals Receiving Payment or Reimbursement guide. If you are a student, refer to the Registering as a Columbia University Vendor for Students (and Prospective Students) guide.

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

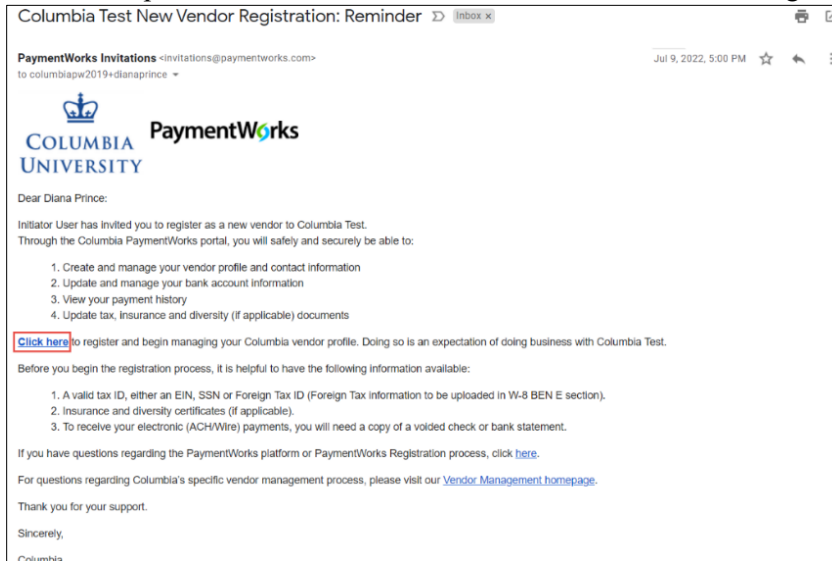
Table of Contents

Creating a PaymentWorks Account..... 2
Completing Tax Information 5
Completing Primary Profile Information..... 7
Completing Addresses 7
Completing Payment Information 8
Completing Conflict of Interest Information..... 9
Completing Purchase Order (PO) Information..... 10
Completing Insurance Certificates Information 10
Completing Additional Fields 11
Submitting the New Vendor Registration Form..... 11
Connecting to Columbia Using Your Existing Account 11
Tracking Your Vendor Onboarding Status..... 12
Continuing or Editing Your Registration From..... 12
Updating Your Account Information..... 13
Invoices and Remittances 15
Getting Help 15

Creating a PaymentWorks Account

You will receive an email invitation from Columbia University asking you to create a PaymentWorks account and complete the New Vendor Registration form. If you are not the person within your organization who will be completing and submitting 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 email to begin.

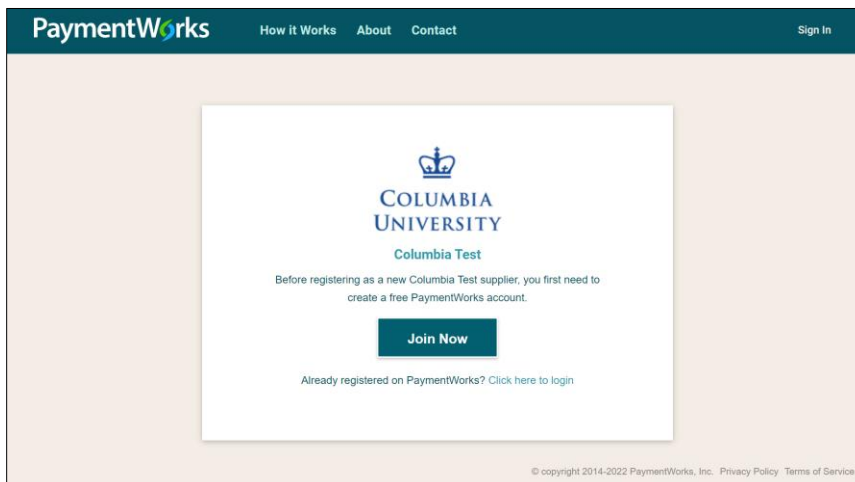


If you are new to PaymentWorks, you will be prompted to join.

If you already have a PaymentWorks (but not yet connected to Columbia), login to PaymentWorks. Refer to the *Connecting to Columbia Using Your Existing Account* section in this guide.

Note: *It is important to use the invitation link to begin your registration to Columbia University on PaymentWorks. If you are not the right person to complete the New Vendor Registration form, please forward the email to the appropriate contact in your company.*

2. Click [Join Now](#).



3. Complete all the fields to create the PaymentWorks account.

Payees (Suppliers)

Join PaymentWorks for Free

Your Information

Create Password

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

Join Now

1

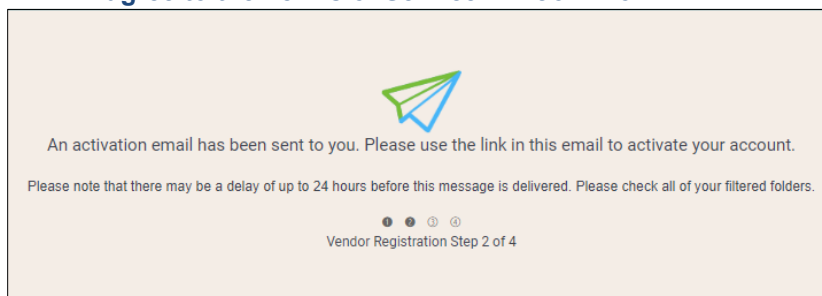
2

3

4

Vendor Registration Step 1 of 4

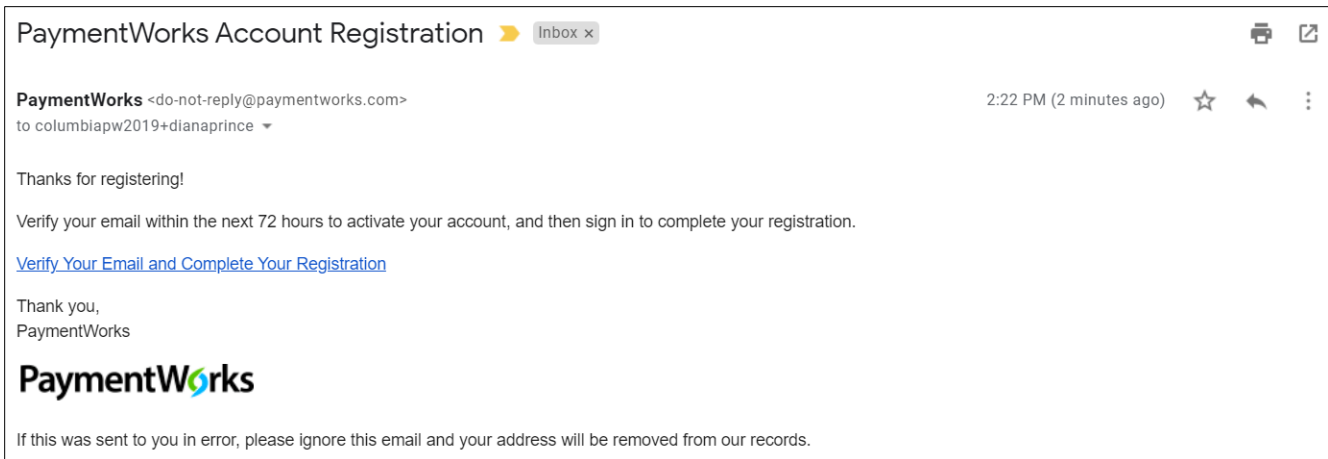
4. Click to **agree to the Terms of Service** and **Join Now**.



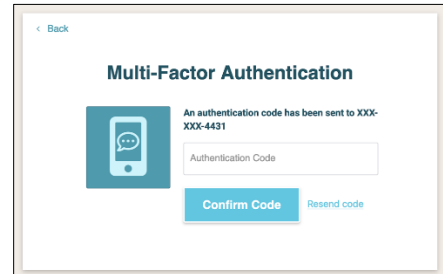
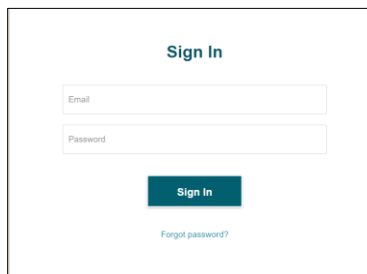
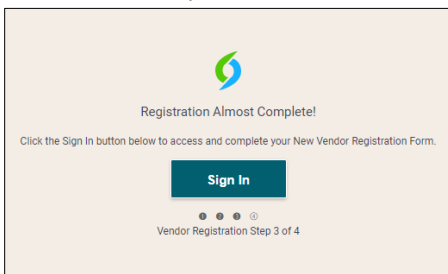
You will receive a verification email.

Columbia University Finance Training

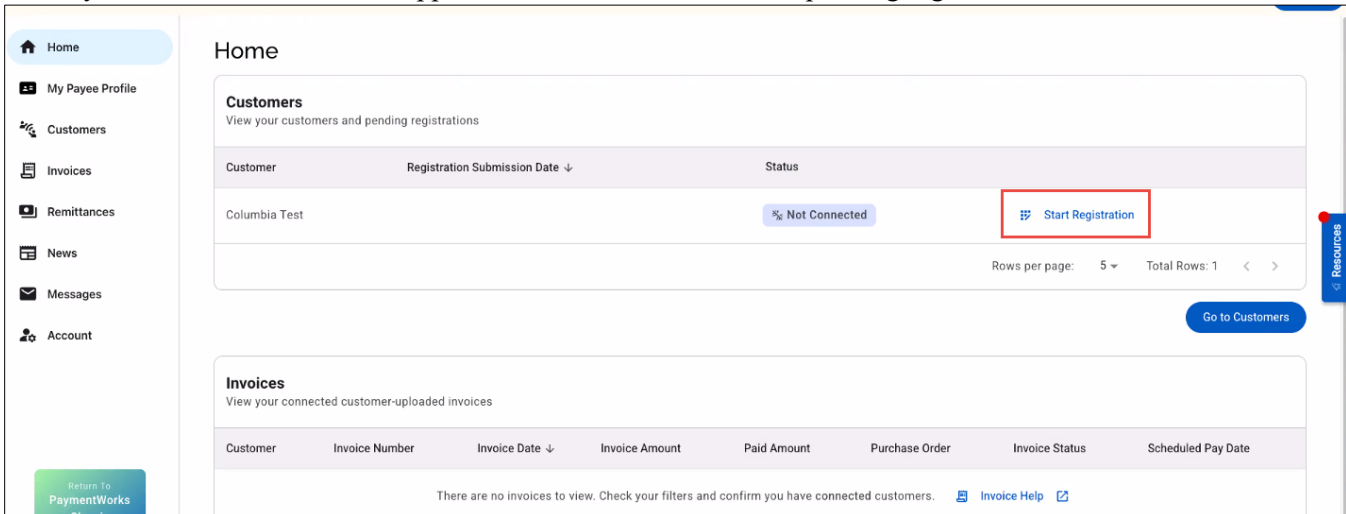
Creating a PaymentWorks Account and Registering as a Columbia University Vendor



5. From the email you receive, click **Verify Your Email and Complete Your Registration**.



The PaymentWorks Home screen appears with Columbia listed as a pending registration.



6. Click the **Start Registration** link. The Tax Information page of New Vendor Registration form appears

Completing Tax Information

Based on your vendor category, the questions you encounter change while completing the form. A Help panel appears on the right side of the screen to guide you and answer most frequently asked questions.

How should we classify you for payments and tax reporting?

This helps us gather the correct information to complete your profile and get you paid.

Individual Sole Proprietor **Business Entity**

Back Next

Need Help with Tax Information?

Below are resources to assist in completing this section. Click on a topic to learn more.

1. General Tax Information Help

FAQ's related to vendor onboarding. [Learn more](#)

2. Why Am I Being Asked for a Tax ID?

PaymentWorks requires a tax ID for identity verification and tax compliance. [Learn more](#)

3. Understanding TIN Types

Your TIN depends on your entity type:

- **Social Security Number (SSN)** → U.S. individuals or

Note: If you are an individual payee or student, select the **Individual** option. For individual payees, refer to [Registering as a Vendor for Individuals Receiving Payment or Reimbursement](#) guide. For students, refer to the [Registering as a Columbia University Vendor for Students \(and Prospective Students\)](#) guide.

1. Select the option for **Sole Proprietor** or **Business Entity** and click **Next**. Company and Tax information screens related to your category selection appear
2. Select **where your business is registered** or **where you are responsible for tax reporting**. The tax ID and document requirements will be listed based on your selection.

Where are you responsible for tax reporting?

For individuals, this is usually your home country.

For businesses and sole proprietors using a business tax ID, choose the country where your business is registered.

All fields marked with an asterisk (*) are required.

Country of Origin or Organization *

Gather the following before starting to help you complete your form:

- ☒ Your Non-US Tax ID
OR Individual Taxpayer Identification Number (ITIN)
OR Social Security Number (SSN), if applicable
- ☒ Passport, if applicable
- ☒ Visa, if applicable
- ☒ Form 8233, if applicable
- ☒ W-8BEN

Back Next

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2. Why Am I Being Asked for a Tax ID?

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3. Understanding TIN Types

Your TIN depends on your entity type:

- **Social Security Number (SSN)** → U.S. individuals or Sole Proprietors
- **Individual Tax Identification Number (ITIN)** → Non-U.S. individuals filing U.S. taxes
- **Employer Identification Number (EIN)** → U.S. businesses or Sole Proprietors
- **Non-U.S. Tax ID** → Non-U.S. businesses or individuals

If you your tax reporting or business is registered outside of the United States, you will be asked whether you are performing services in the US. Depending on your scenario, you may be required to upload passport and visa documents.

3. Make the appropriate selections and complete the required fields as they appear.
4. If your tax reporting or business is registered in the United States, you have the option to generate your **W-9** automatically.

This screenshot shows the 'Does your W-9 include any special entries?' screen in the PaymentWorks system. The left sidebar contains a navigation menu with items 1 through 7: Tax Information (selected), Primary Profile Information, Addresses, Payment Information, Conflict of Interest, Purchase Orders, and Insurance Certificates. The main content area has a heading 'Does your W-9 include any special entries?' and a subtext 'Special entries include FATCA exemption codes or other non-standard information.' Below this are two options: 'No, We'll generate your W-9 automatically.' and 'Yes, Upload your completed W-9.' with 'Back' and 'Next' buttons. The right sidebar contains a 'Release' button and links to '5. Entering Tax Information for Multiple Organizations' and '6. Tax Form Directions'.

If you are a non-U.S. taxpayer, please upload your completed **W-8 BEN** form. You can download a blank form, if needed.

This screenshot shows the 'W-8 Certification' screen in the PaymentWorks system. The left sidebar contains a navigation menu with items 1 through 5: Tax Information (checked), Primary Profile Information (checked), Addresses (checked), Payment Information (4), and Conflict of Interest (5). The main content area has a heading 'W-8 Certification' and a subtext 'Upload your completed W-8 form to certify your tax status.' Below this is a text box with the instruction 'If you are a non-U.S. taxpayer, please upload your completed W-8 BEN form to certify your tax status.' and a link to download a blank W-8 BEN form. There is also a button to 'Please upload W-8 BEN. *' and a note 'Supports PDF or image files. File size limit is 5 megabytes.' The right sidebar contains a 'Need Help with Tax Information?' section with links to '1. General Tax Information Help', '2. Why Am I Being Asked for a Tax ID?', and '3. Understanding TIN Types'.

5. Click **Save and Continue** to progress to Primary Profile Information.

Completing Primary Profile Information

The Primary Profile section asks for **Phone Number**, **Preferred Email**, optional Website URL, and **Description of Goods/Services you are providing or the reason you're being paid**.

The screenshot shows the 'Business Information' form. On the left is a vertical navigation menu with steps 1 through 7: Tax Information, Primary Profile Information (selected), Addresses, Payment Information, Conflict of Interest, Purchase Orders, and Insurance Certificates. The main form area has the title 'Business Information' and a subtitle 'This information is necessary for identity verification and communication purposes.' Below this are three input fields: 'Business Phone Number *' with the value '12015551212', 'Preferred Email *' with the value 'acme@acmerunner.com', and 'Website URL'. At the bottom right are 'Back' and 'Next' buttons. On the far right is a help panel titled 'Here are common questions and tips to help you complete your contact details and business description. This ensures your identity or business can be verified, and helps your customer reach you for any payment-related questions or issues.' It contains two sections: '1. What Phone Number Should I Enter?' with bullet points for 'Individuals' and 'Businesses', and '2. What Email Address Should I Use?' with instructions on the best email for communication.

1. Complete all the required fields on the screens that appear. Use the Help panel on how to complete the requested information.
2. Click the **Next** button at the bottom of the form to move to the next screen and click Save and Continue to move to the Addresses section.

Completing Addresses

Complete the fields for your **Primary** and **Remittance Addresses**. You can select the option to make your Remittance Address the **Same as Primary Address**.

The screenshot shows the 'Addresses' form. The left navigation menu is the same as in the previous screen, with 'Addresses' (step 3) now selected. The main form area has the title 'Enter your primary business address. This will be used for all official correspondence.' Below this are several input fields: 'Country *' with a dropdown menu showing 'United States of America', 'Address Line 1 *', 'Address Line 2', 'City *', 'State / Province / Territory *' with a dropdown menu showing 'Alabama', and 'Zip / Postal Code *'. At the bottom right are 'Back' and 'Next' buttons. On the far right is a help panel titled 'Here are common questions and tips to help you complete your address details accurately.' It contains two sections: '1. What Is My Primary Address Used For?' with instructions for 'Individuals' and 'Businesses', and '2. How Does Address Validation Work?' explaining the use of the SmartyStreets tool.

Columbia University Finance Training

Creating a PaymentWorks Account and Registering as a Columbia University Vendor

✓ Tax Information

✓ Primary Profile Information

3 Addresses

4 Payment Information

5 Conflict of Interest

6 Purchase Orders

7 Insurance Certificates

8 Additional Fields

This is the address where payments should be sent.

Note: You are only required to enter one remittance address at this time. Once your profile is created, you will have the ability to manage and add additional remittance addresses as needed.

☐ Same as primary address

Enter Contact Details for Accounts Receivable

Please provide the contact details for Accounts Receivable related to this address. This should be someone responsible for accounts receivable who can handle billing and payment inquiries.

Contact Name *

Contact Email *

Contact Phone *

Enter Remittance Address

Address Nickname *

Remittance Address

Country *
United States of America

Address Line 1 *
615 W 131st St

Address Line 2

City *
New York

State / Province / Territory *
New York

Zip / Postal Code *

Here are common questions and tips to help you complete your address details accurately.

1. What Is My Primary Address Used For?

Your primary address is the main location associated with your profile.

- Individuals:** Use your home/primary address.
- Businesses:** Use your corporate or headquarters address. This information is required for identity verification and communication.

2. How Does Address Validation Work?

PaymentWorks uses a tool called **SmartyStreets** to verify addresses against the USPS database and other global postal standards. This helps ensure accuracy and proper formatting for postal delivery.

- As you type, the system suggests verified formats. If found, your fields will be auto-filled.
- If a match isn't found, you can enter the address manually.
- For U.S. addresses, USPS formatting is applied. For non-U.S. addresses, we follow country-specific postal standards. If your address is flagged as invalid, it doesn't always mean it's incorrect. Common causes include:
 - Typos**
 - Non-standard formatting**
 - Missing from postal database Note:** Even if validation fails, you can proceed if your address is correct—your customer can review it. [Learn more](#)

Click the **Save and Continue** 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.

Completing Payment Information

1. Select your **Bank Location** and click Next to show the correct payment options and format for your bank details.

✓ Tax Information

✓ Primary Profile Information

✓ Addresses

4 Payment Information

In which country is your bank located?

This helps us choose the correct banking details and payment options for your account.

Country of Origin or Organization *

United States of America

Back

Next

2. Depending on your location selection, you have the options for
 - **ACH** (U.S. only): Direct deposit -preferred
 - **Wire Transfer:** (international only)
 - **Check:** Mailed to your address

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Creating a PaymentWorks Account and Registering as a Columbia University Vendor

The screenshot shows a multi-step registration form. The left sidebar lists steps: 1. Tax Information, 2. Primary Profile Information, 3. Addresses, 4. Payment Information (highlighted), 5. Conflict of Interest, 6. Purchase Orders, 7. Insurance Certificates, and 8. Additional Fields. The main content area is titled 'How would you like to receive payments?'. It features two options: 'Check (Additional Approval Required)' and 'ACH (Preferred)'. The 'ACH (Preferred)' option is highlighted with a blue border and a 'RECOMMENDED' badge. Below these options, there is a section for 'Standard Methods' with another 'ACH (Preferred)' option. On the right side, there are three informational sections: '2. Which payment method should I choose?', '3. What bank information do I need?', and '4. Why do I need to upload a bank validation document?'. At the bottom right, there are 'Back' and 'Next' buttons.

3. If you select ACH or Wire Transfer, you may be asked for:
 - **Account Name**
 - **Account Number**
 - **Routing Number** (U.S. only)
 - **IBAN** or **SWIFT/BIC** (outside the U.S.)
4. **Validate** your bank details based on the selections above.
5. Enter the **Payment Notification Email Address** for the individual receiving payment notifications. Click **Save and Continue** to progress to the Conflict of Interest section.

Completing Conflict of Interest Information

A conflict of interest occurs when you, or someone at your company, has a personal, family, or financial relationship with someone who works at Columbia University that could influence, or appear to influence, business decisions.

The screenshot shows the 'Conflict of Interest' section of the registration form. The left sidebar highlights step 5, 'Conflict of Interest'. The main content area is titled 'Are you aware of any potential conflicts of interest with Columbia Test?'. It includes a sub-header 'This includes any known connections between people at your organization and individuals affiliated with Columbia Test, even if you were not directly involved but are aware of the relationship.' Below this, there are two options: 'Yes, I'm aware of one or more conflicts' and 'No, I'm not aware of any conflicts'. At the bottom right, there are 'Back' and 'Next' buttons. On the right side, there is a section titled 'Conflict of Interest Help' with two sub-sections: '1. What is considered a conflict of interest?' and '2. Why does [Organization] need this information?'.

Make the appropriate selection and click **Next**.

If you indicate Yes, you will be asked to disclose individuals affiliated with Columbia University and the nature of the relationship.

Click **Save and Continue** to progress to the Purchase Order section.

Completing Purchase Order (PO) Information

Indicate if you will be accepting Purchase Orders from Columbia University.

The screenshot shows a web form for completing Purchase Order (PO) information. On the left is a vertical sidebar with a list of steps: Tax Information, Primary Profile Information, Addresses, Payment Information, Conflict of Interest, and Purchase Orders (which is highlighted with a blue circle and the number 6). The main content area has the heading "Do you or your business accept Purchase Orders (POs)?" followed by a subtext: "This helps us determine if you're set up to receive and process Purchase Orders from customers." Below this are two buttons: "I accept POs" (with a green checkmark icon) and "I don't accept POs" (with a red X icon). At the bottom right of the main area are "Back" and "Next" buttons. On the right side of the form, there is a sidebar with three sections: "Which delivery methods should I select?" (with a note about email being required), "Who should I list as the PO Contact?" (with a note about providing details of the person or department), and "Can I change my PO delivery methods later?" (with a note about updating the profile).

Make the appropriate selection and click **Next**.

If you indicate Yes, you will be asked to select a delivery method and contact details. Email is Columbia's preferred PO delivery method.

Click **Save and Continue** to progress to the Insurance Certificates section.

Completing Insurance Certificates Information

You can provide details on any active business insurance policy you hold that protects your organization or customer relationships.

The screenshot shows a web form for completing Insurance Certificates information. On the left is a vertical sidebar with a list of steps: Addresses, Payment Information, Conflict of Interest, Purchase Orders, Insurance Certificates (which is highlighted with a blue circle and the number 7), and Additional Fields. The main content area has the heading "Do you have any insurance coverage to provide?" followed by a subtext: "We'll help you create a digital record ('coverage card') for each type of insurance coverage you hold." Below this are two buttons: "Yes - I have at least one type of insurance coverage" (with a green umbrella icon and a checkmark) and "No - I will not be providing insurance coverage" (with a red umbrella icon and an X). At the bottom right of the main area are "Back" and "Next" buttons. On the right side of the form, there is a sidebar with two sections: "Need Help with Insurance Information?" (with a note about common questions and tips) and "1. What Does 'Insurance Coverage' Mean in This Section?" (with a definition of insurance coverage and a list of common examples: Commercial General Liability (CGL), Workers' Compensation, and Professional or Cyber Liability).

Make the appropriate selection and click **Next**.

If you indicate Yes, you will be asked to add the Insurance Coverage, upload the Insurance Certificate, attest if Columbia has been added as an additional insured, and select the type of coverage.

Click **Save and Continue** to progress to the Insurance Certificates section.

Completing Additional Fields

The Additional Information section contains fields specific to Columbia. For more detailed information, refer to Columbia's [Vendor Management website](#).

The screenshot shows the 'Additional Information' section of a vendor registration form. On the left is a vertical sidebar with navigation links: 'Addresses', 'Payment Information', 'Conflict of Interest', 'Purchase Orders', 'Insurance Certificates', and 'Additional Fields' (which is highlighted with a blue circle and the number 8). The main content area is titled 'Additional Information' and includes a note: 'All fields marked with a red asterisk (*) are required fields. All other fields are optional.' To the right, under the heading 'Additional Vendor Management Information', there is a link to the 'Vendor Management homepage'. Below this, the 'Supplier Category' section has a dropdown menu labeled 'Select an Option'. The 'Vendor Classification for US Entities' section, marked with a red asterisk, asks 'As a US Entity, what best describes your business relationship to Columbia?' and also has a dropdown menu labeled 'Select an Option'.

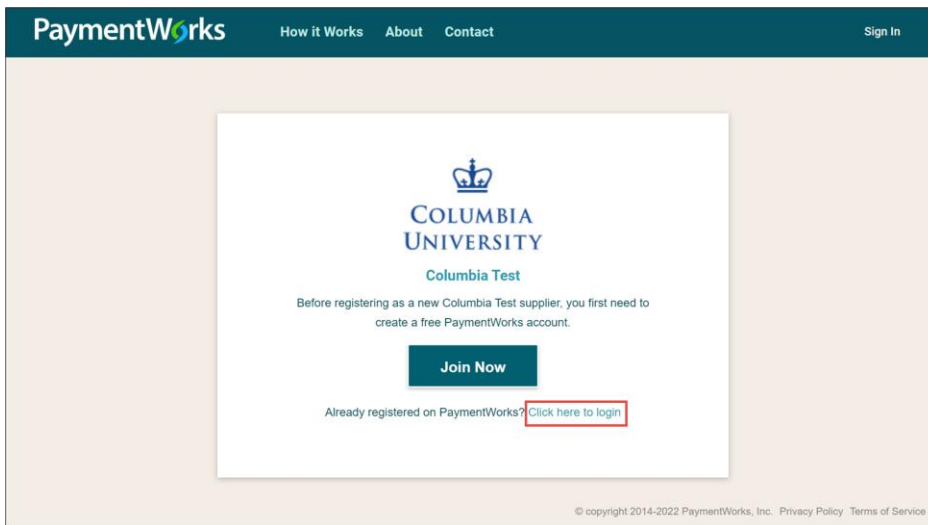
Submitting the New Vendor Registration Form

After entering all required fields in the Additional Information section, click the **Save and Continue** button.

After Columbia approves your new vendor registration, you will be notified via email.

Connecting to Columbia Using Your Existing Account

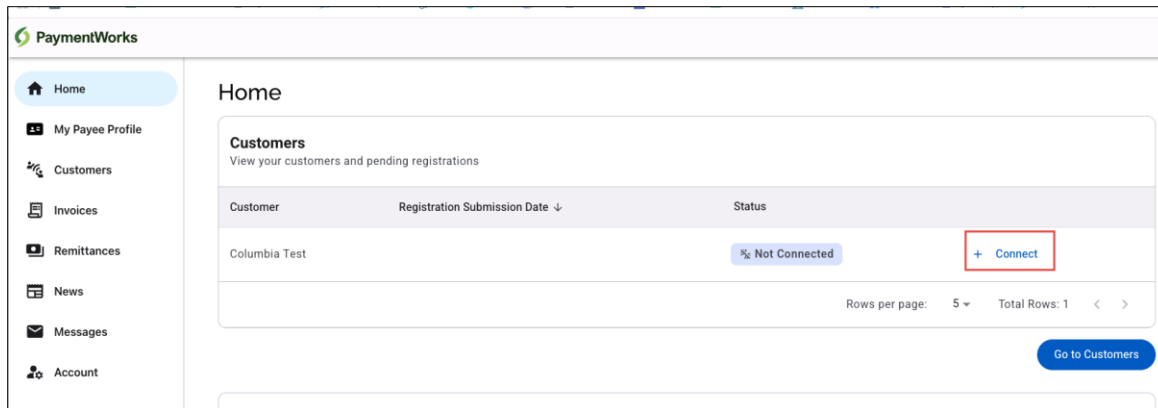
If you already have an existing PaymentWorks account, you may use this account to complete vendor registration if invited to connect to Columbia. After clicking the link within the invitation email:



1. Click the **Click here to login** link to login and log into PaymentWorks. Columbia University is listed on **Home** page or the **Customers** page with other Customers for which you may be connecting or already connected.

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Creating a PaymentWorks Account and Registering as a Columbia University Vendor

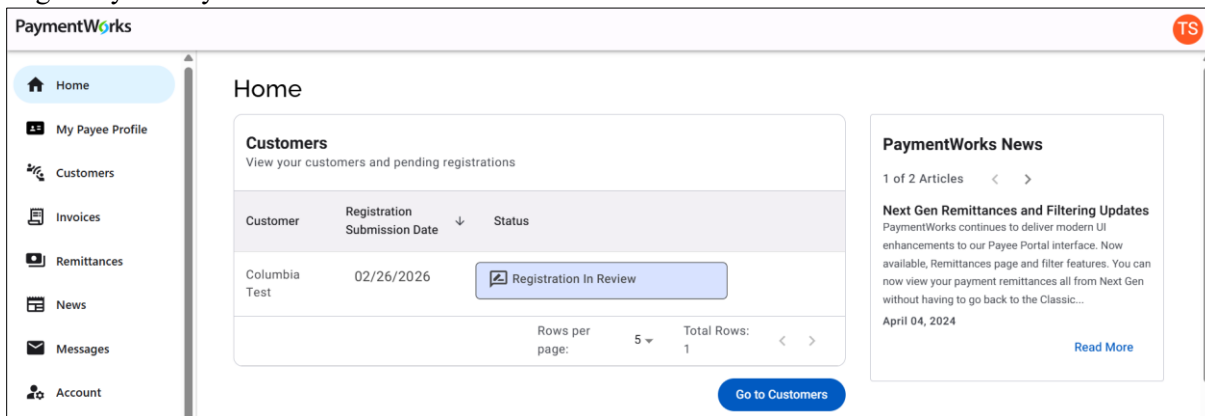


2. Click the **Connect** link for Columbia University to open and complete Columbia's New Vendor Registration form. Refer to [How to Quick Connect](#) on how to connect a new customer to your existing account.

Tracking Your Vendor Onboarding Status

You can track the status of your connection to Columbia and other customers you may have connected to using PaymentWorks.

Login to your PaymentWorks Account.

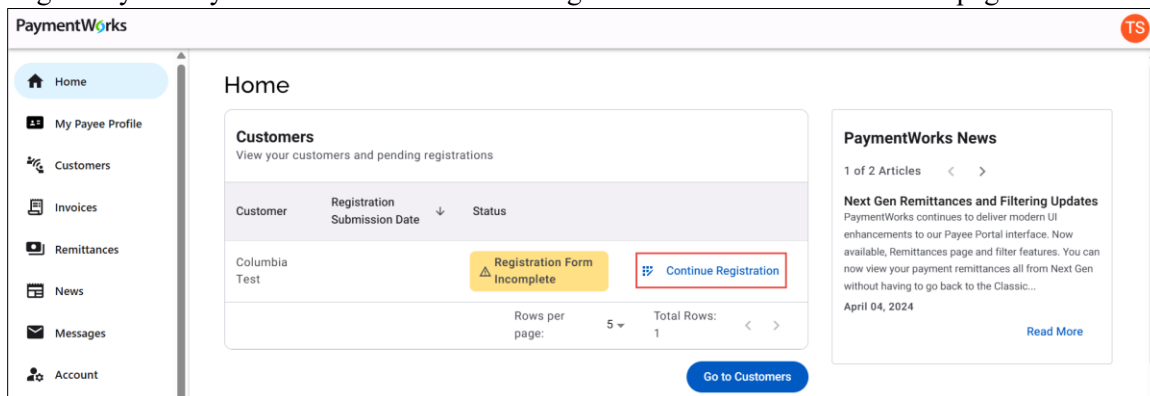


Your onboarding status appears on the **Home** or **Customers** page.

Continuing or Editing Your Registration Form

If you logged out of PaymentWorks before completing your Registration Form or if your Registration Form was returned for edits or additional information, you can access your Form to take action.

1. Log in to your PaymentWorks account and navigate to the **Home** or **Customers** pages.



2. Click the **Continue Registration** link if your Registration Form is not complete.

Columbia University Finance Training

Creating a PaymentWorks Account and Registering as a Columbia University Vendor

PaymentWorks

You are impersonating user: Fake Payee User (generated-payee-11393-mtszrfkb@paymentworks.com).

Home

My Payee Profile

Customers

Invoices

Remittances

News

Messages

Account

Home

Customers

View your customers and pending registrations

Customer	Registration Submission Date ↓	Status
Columbia Test	06/22/2026	Profile/Connection Returned

View Messages

Edit/Resubmit

Rows per page: 5 Total Rows: 1

Go to Customers

Click the **Edit/Resubmit** link if the Registration Form has been returned to you for edits or additional information.

Updating Your Account Information

Updating Global Account Information

Your **My Payee Profile** contains your Primary Information, including your E-Mail address and Telephone number. You can also update Legal Entity, Bank Accounts, Tax Forms, and Addresses.

Your Account **Telephone** number is used for multifactor authentication (MFA) when you log-in to your Account. **If you need to update your Telephone number, do so before your old Telephone becomes unavailable.** If you are unable to access PaymentWorks due to an unavailable, inactive, or out of date Telephone number, contact the [PaymentWorks Customer Support](#) on the steps required to access your account and update your Telephone number.

1. Login to your PaymentWorks account and click the **My Payee Profile** menu.

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

Primary Contact Info

123 test
5th floor
new york, NY
10027 US
telephone: (212) 854-2913
email: test@test.com

Description of Products or Services

testing ach view

View or Edit Details

Legal Entity Information

Tax Details

Legal Name: Individual, Scenario 13
Country: US
Tax Identification Number:
***-**-6789
Tax Class: Individual
Doing Business As: Scenario 13
Individual

Tax Identification Valid

View or Edit Details

Bank Accounts (1)

Scenario 13
Individual
JPMORGAN CHASE
BANK, NA

(...6789)
Personal
Checking

Add Account

Tax Forms

Download File on Record

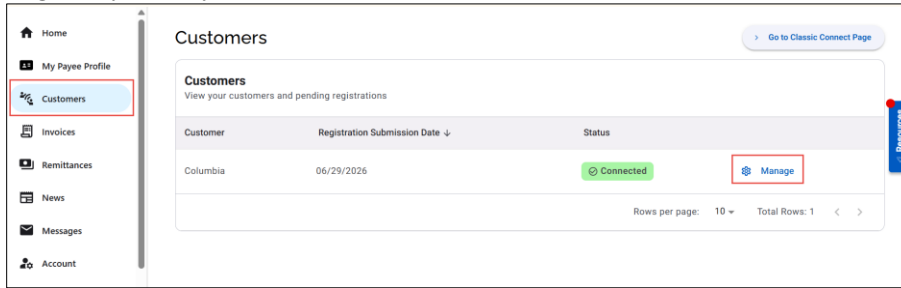
View or Edit Details

Resources

2. You can make the following edits:
 - Click one of the **View or Edit Details** links to edit the details in that section.
 - Click an **existing Bank Account** to edit that account or click the **Add Account** button to add an additional bank account.

Updating Your Columbia Specific Information

1. Login to your PaymentWorks account and click the **Customers** menu.



2. Click the **Manage** link. The Update Connection window appears. Notice the note about modifying global values in your Payee Profile.

A screenshot of a modal dialog box titled 'Update Connection to Columbia'. It features a yellow warning banner at the top stating: 'This dialog allows you to set values for this specific connection. To modify global values, you should go to your Payee Profile and make changes there.' Below the banner are three sections, each with a green checkmark icon and an 'Edit' button: 'Remittance Address' with a 'View Address' button, 'Payment Information' with an 'Edit Payment' button, and 'Conflict of Interest' with an 'Edit Conflicts' button. At the bottom right of the dialog are 'Cancel' and 'Next' buttons.

3. Click the **Edit** buttons to modify the desired sections.
4. Click the **Next** button to navigate to the questions page.

A screenshot of a modal dialog box titled 'Update Connection to Columbia Test'. It contains a question: 'Are you a certified diverse business?*' with a dropdown menu below it showing 'No'. At the bottom right is a 'Save and Continue' button (highlighted with a red box). At the very bottom of the dialog are 'Back' and 'Update Connection' buttons (the latter is highlighted with a red box).

5. After making all desired changes, click the **Save and Continue** button and then click the **Update Connection** button.

Invoices and Remittances

PaymentWorks will only display the invoices you submitted to Columbia that were Paid or Rejected (not in process). Inquiries regarding invoice or payment status should not be made through PaymentWorks.

To view your invoices being processed by Columbia, refer to the [Columbia Finance AP Payment Status & Remittance](#) page where you can look up Payment Status and Remittance Information. You will need your Columbia Vendor ID to lookup Payment Status and Remittance information: refer to the [ARC Vendor ID Lookup](#) page where you can search for your Vendor ID Number in our financial system (ARC).

Note: *When you receive confirmation emails regarding an ACH payment, the email will contain a “tokenized” version of your ACH number, which is a feature to keep your banking information secure. You can check your PaymentWorks Company Profile to view your ACH number and toggle to view the tokenized version.*

Getting Help

If you have questions regarding the PaymentWorks platform or the PaymentWorks Registration process, you can search the [PaymentWorks Help Center](#) topics or contact [PaymentWorks Support](#).

For questions regarding Columbia’s specific vendor management process, please visit our [Vendor Management](#) homepage. If you still have questions, you can contact the [Columbia University Finance Service Center](#).