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.

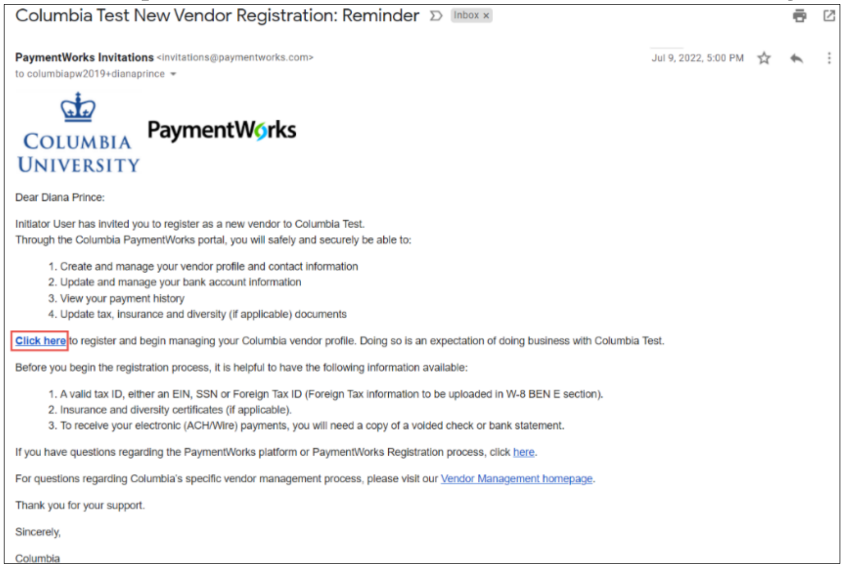
If you are not yet a Columbia University vendor, you must be invited by a Columbia University employee to register as a new vendor via PaymentWorks. If you established a vendor relationship with Columbia prior to the implementation of the PaymentWorks system, you do not need to register via PaymentWorks. 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

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.



Columbia Test New Vendor Registration: Reminder Inbox ×

PaymentWorks Invitations <invitations@paymentworks.com> Jul 9, 2022, 5:00 PM
to columbiapw2019+dianaprince

COLUMBIA UNIVERSITY PaymentWorks

Dear Diana Prince:

Initiator User has invited you to register as a new vendor to Columbia Test.
Through the Columbia PaymentWorks portal, you will safely and securely be able to:

1. Create and manage your vendor profile and contact information
2. Update and manage your bank account information
3. View your payment history
4. Update tax, insurance and diversity (if applicable) documents

Click here to register and begin managing your Columbia vendor profile. Doing so is an expectation of doing business with Columbia Test.

Before you begin the registration process, it is helpful to have the following information available:

1. A valid tax ID, either an EIN, SSN or Foreign Tax ID (Foreign Tax information to be uploaded in W-8 BEN E section).
2. Insurance and diversity certificates (if applicable).
3. To receive your electronic (ACH/Wire) payments, you will need a copy of a voided check or bank statement.

If you have questions regarding the PaymentWorks platform or PaymentWorks Registration process, click here.

For questions regarding Columbia's specific vendor management process, please visit our Vendor Management homepage.

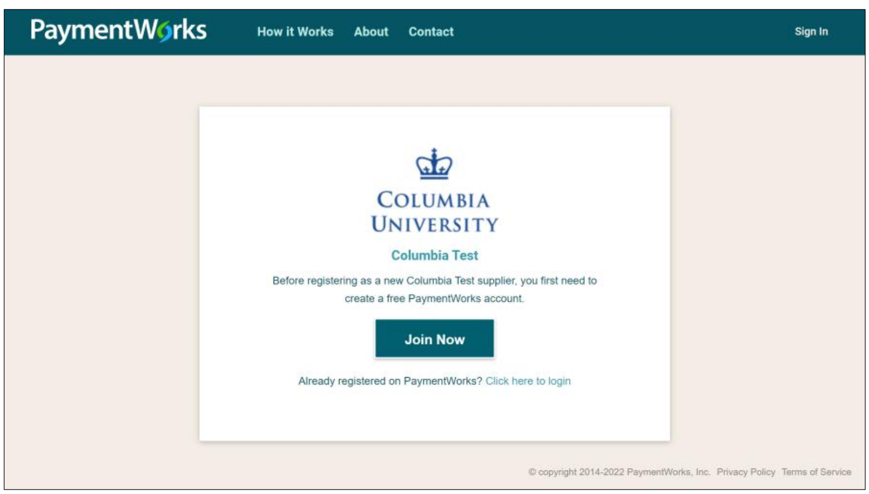
Thank you for your support.

Sincerely,

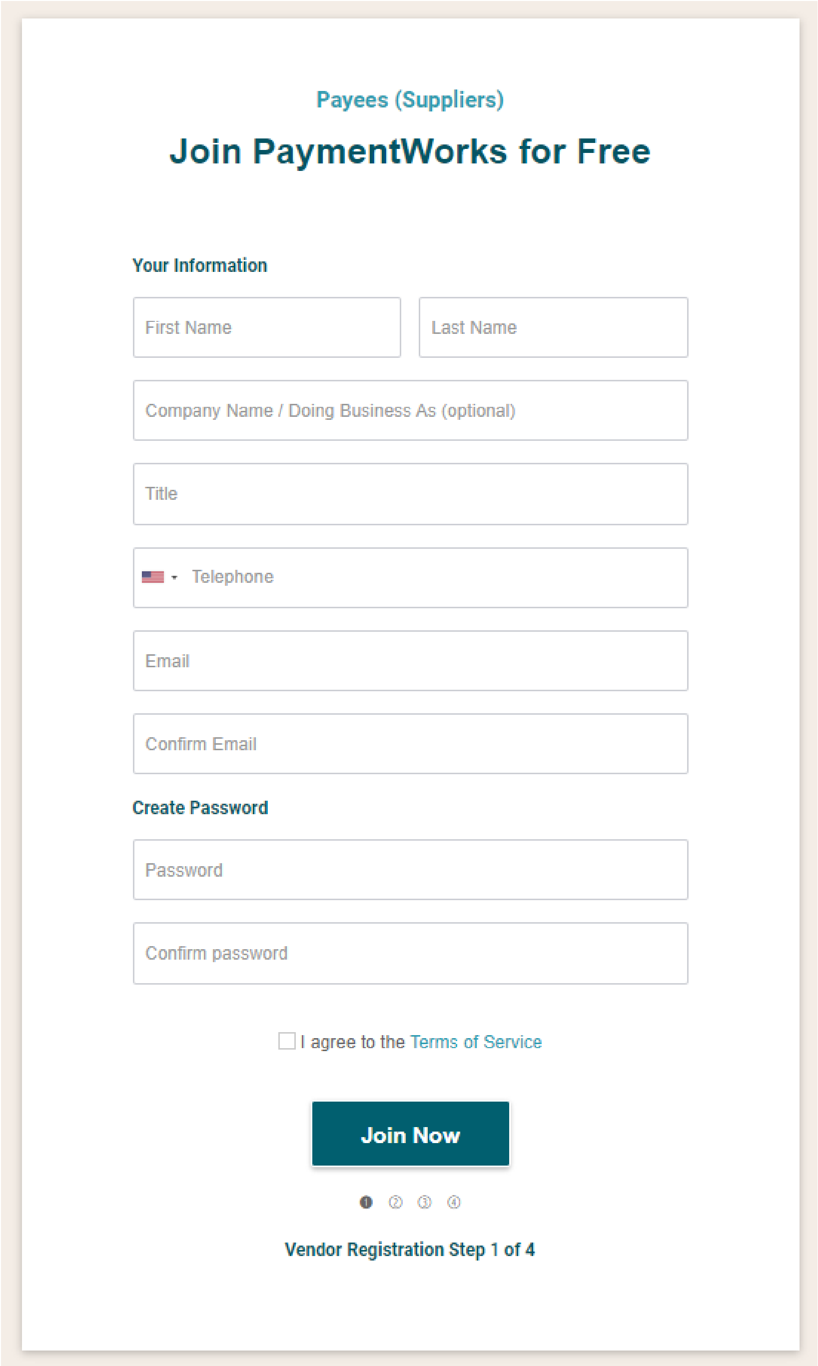
Columbia

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*.

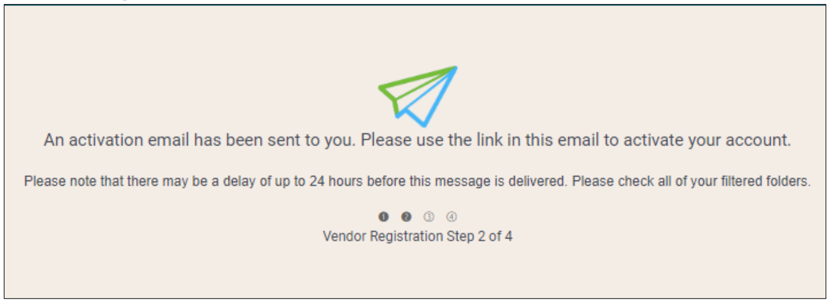
2. Click **Join Now**.



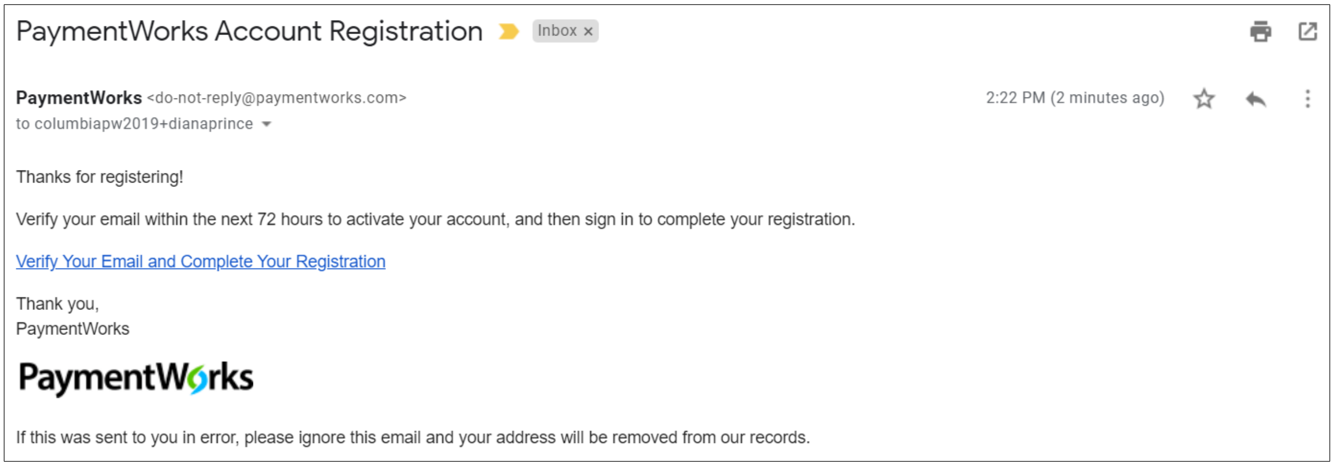
3. Complete all the fields to create the PaymentWorks account.



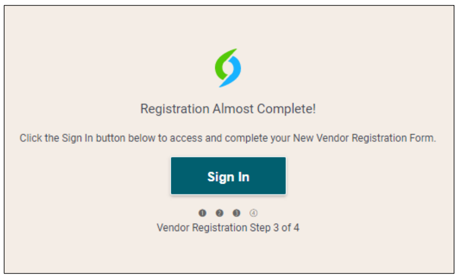
4. Click to **agree to the Terms of Service** and **Join Now**.

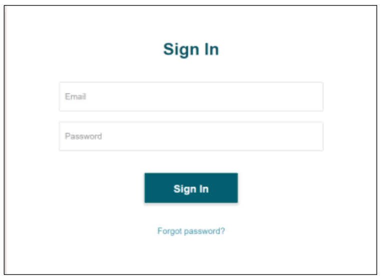


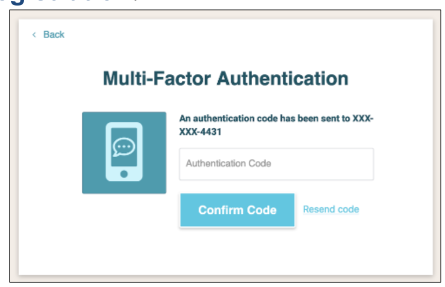
You will receive a verification email.



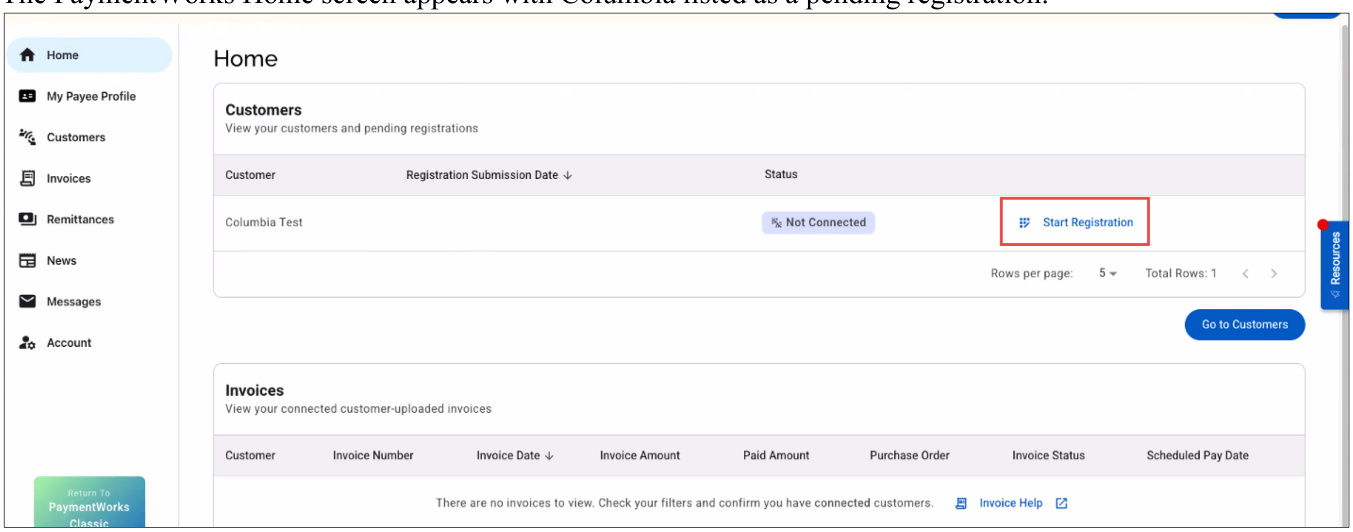
5. From the email you receive, click **Verify Your Email and Complete Your Registration**.







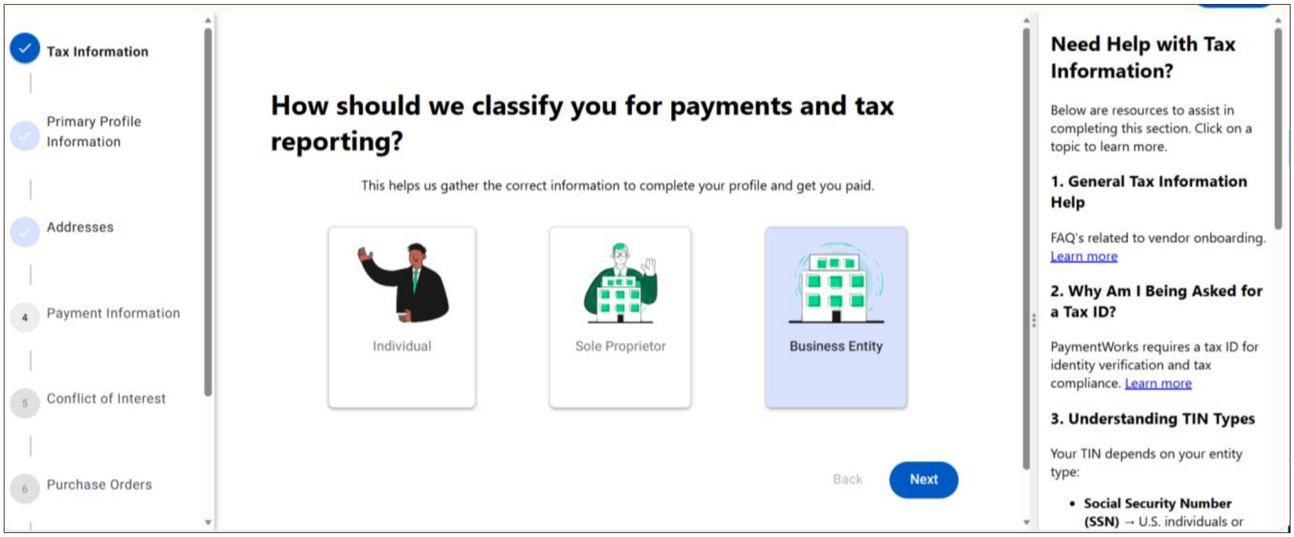
The PaymentWorks Home screen appears with Columbia listed as a pending registration.



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

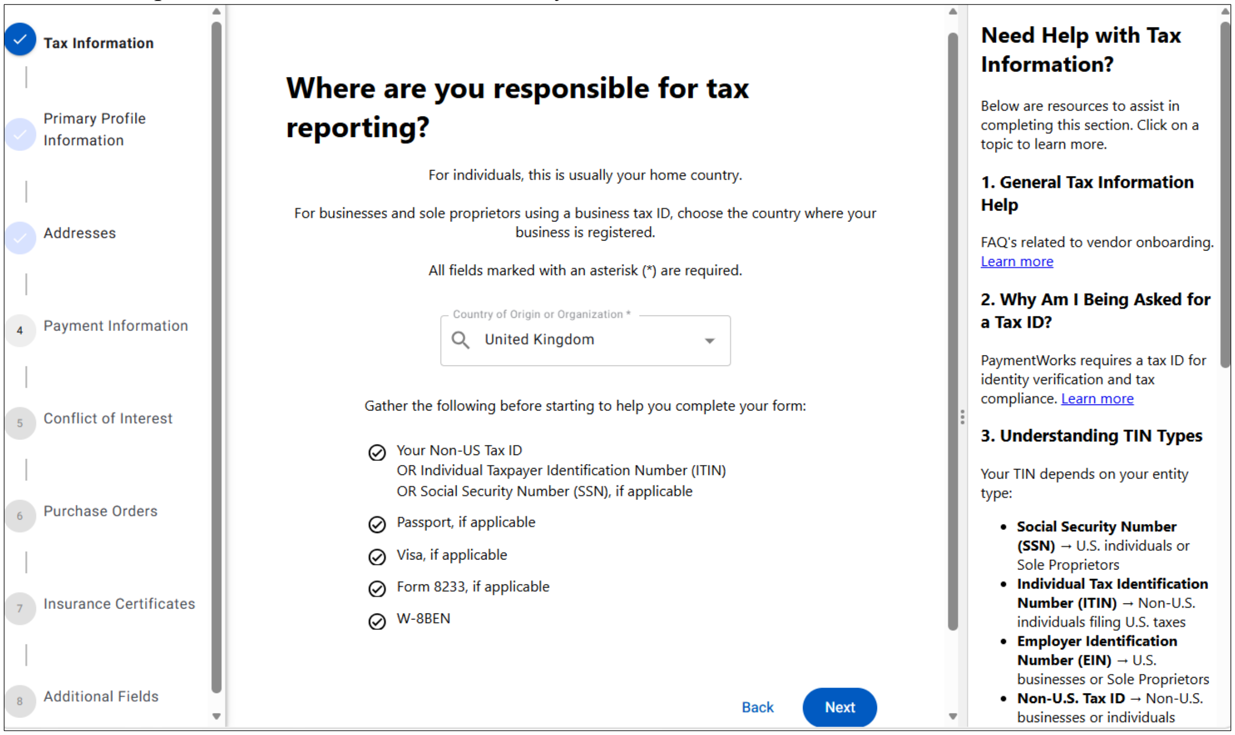
Completing Tax Information

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.



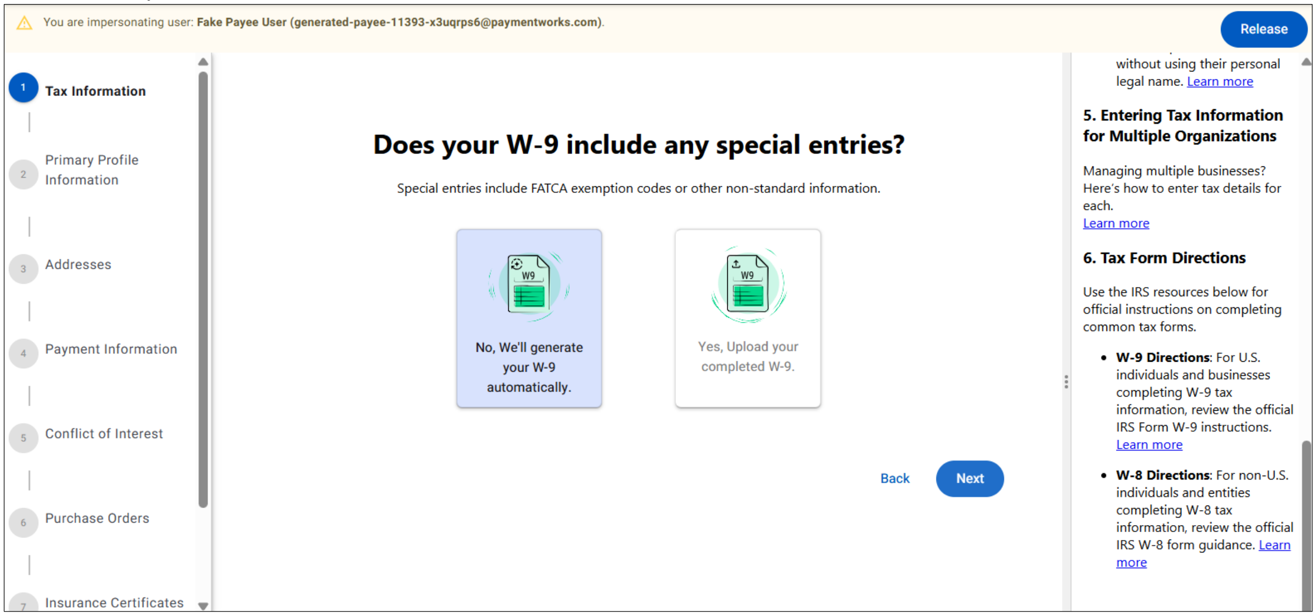
Note: *If you are an individual payee or student, select the Individual option. For individual payees, refer to* [Registering as a Vendor for Individuals Receiving Payment or Reimbursement]() *guide. For students, refer to the* [Registering as a Columbia University Vendor for Students (and Prospective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



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.

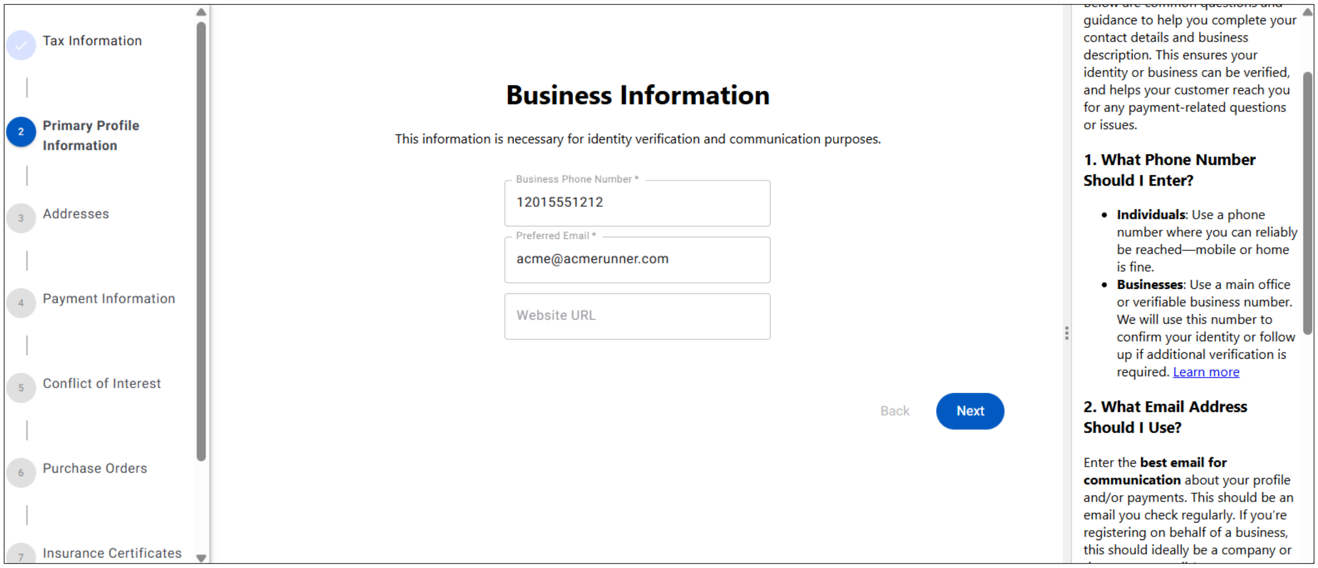


If you are a non-U.S. taxpayer, please upload your completed **W-8 BEN** form. You can download a blank form, if needed.

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

Completing Primary Profile Information

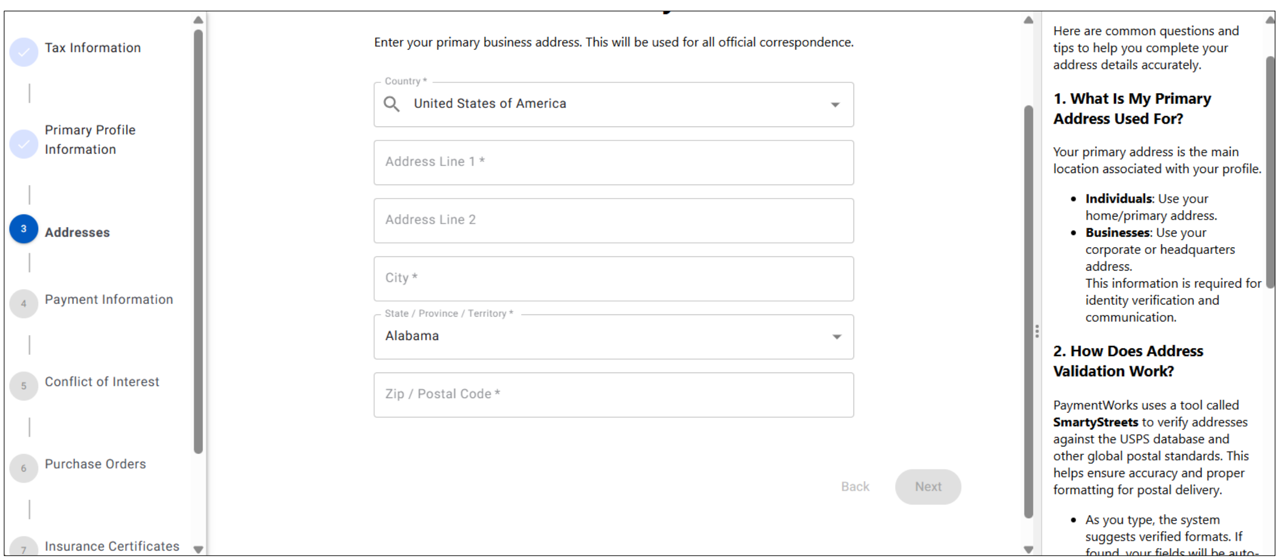
The Primary Profile section asks for **Phone Number**, **Preferred Email**, optional Website URL, and **Description of Goods/Services you are providing or the reason you're being paid**.

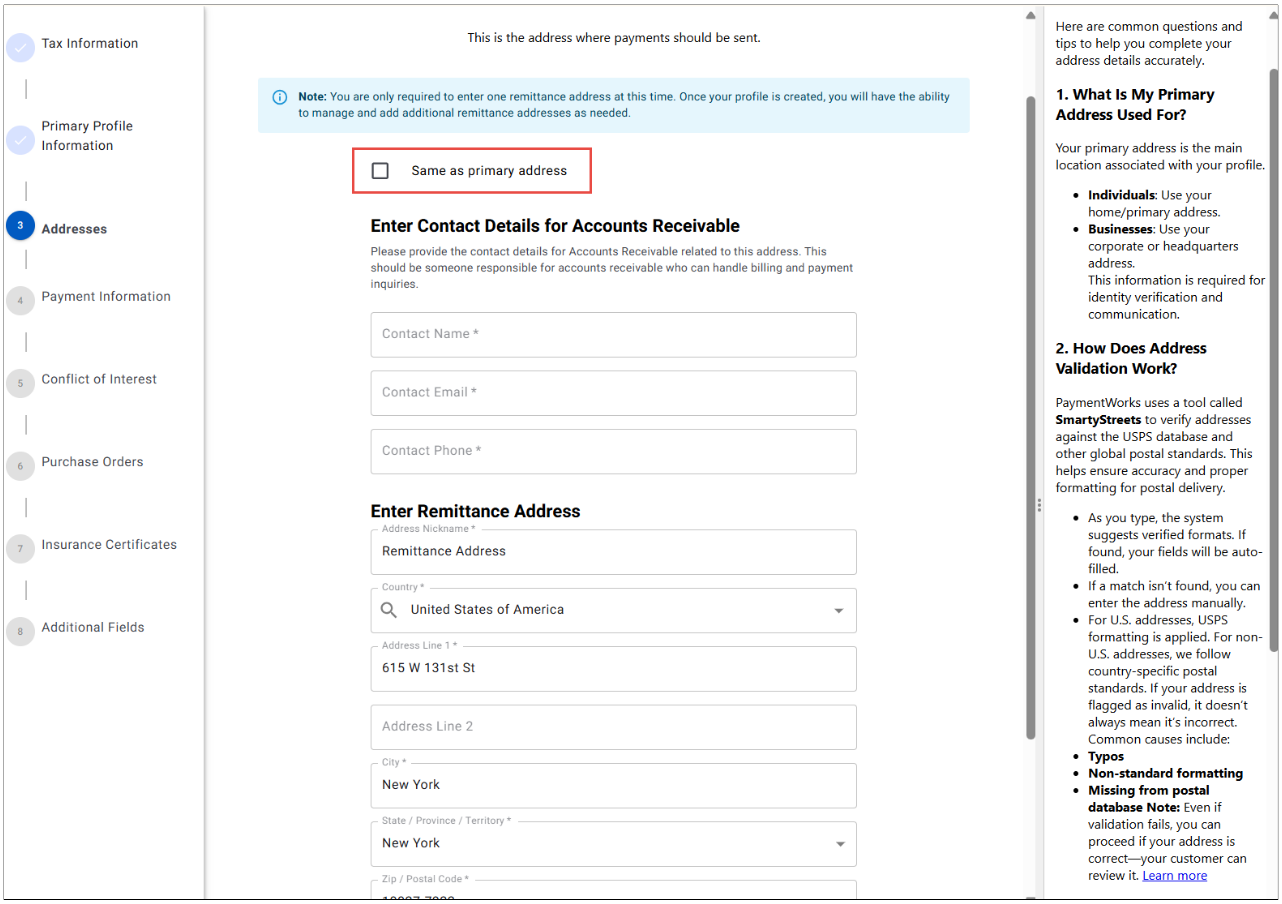


1. Complete all the required fields on the screens that appear. Use the Help panel on how to complete the requested information.
2. Click the **Next** button at the bottom of the form to move to the next screen and click Save and Continue to move to the Addresses section.

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**.

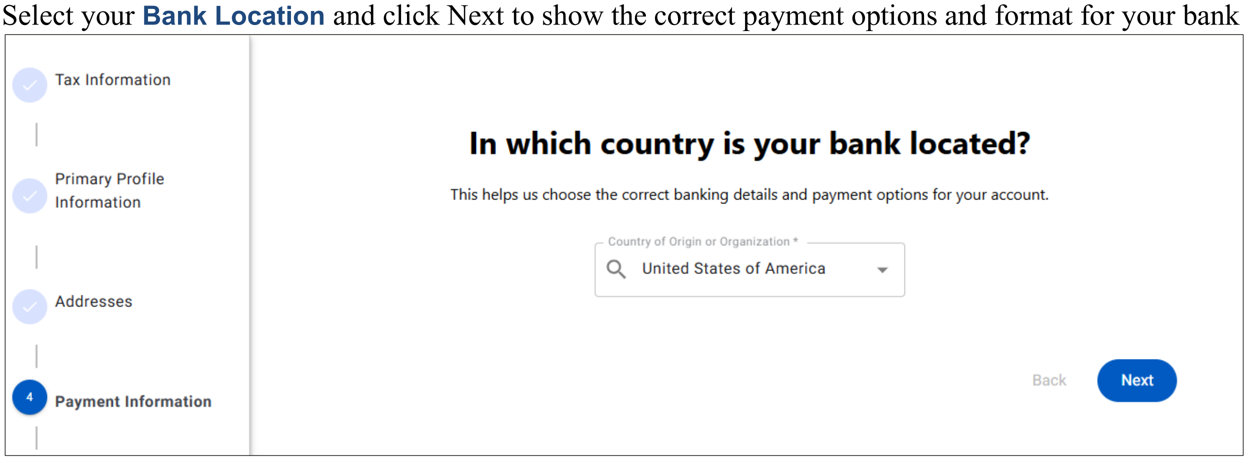




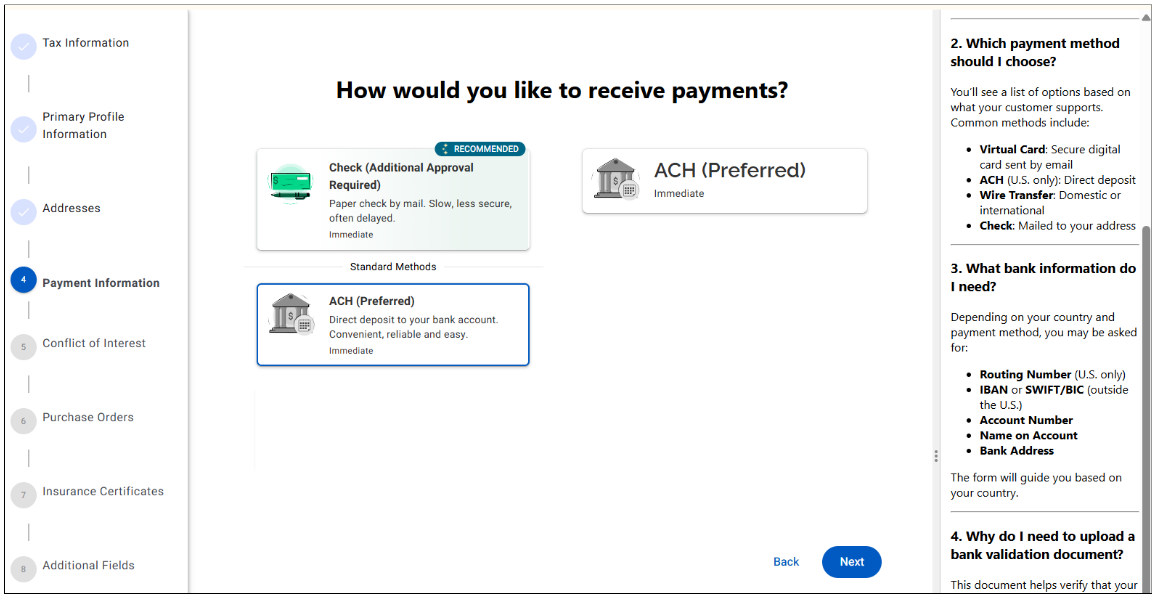
Click the **Save and Continue** button at the bottom of the form to move to the next section or click the tab at the top of the form to move to the appropriate section.

Completing Payment Information

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



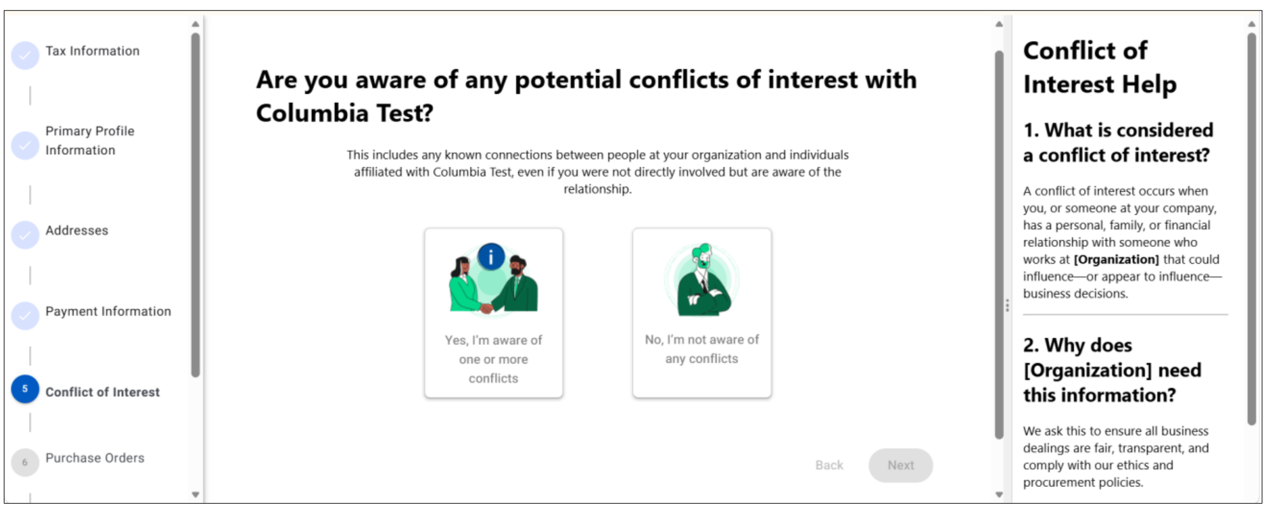
2. Depending on your location selection, you have the options for
   - **ACH** (U.S. only): Direct deposit -preferred
   - **Wire Transfer**: (international only)
   - **Check**: Mailed to your address



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.



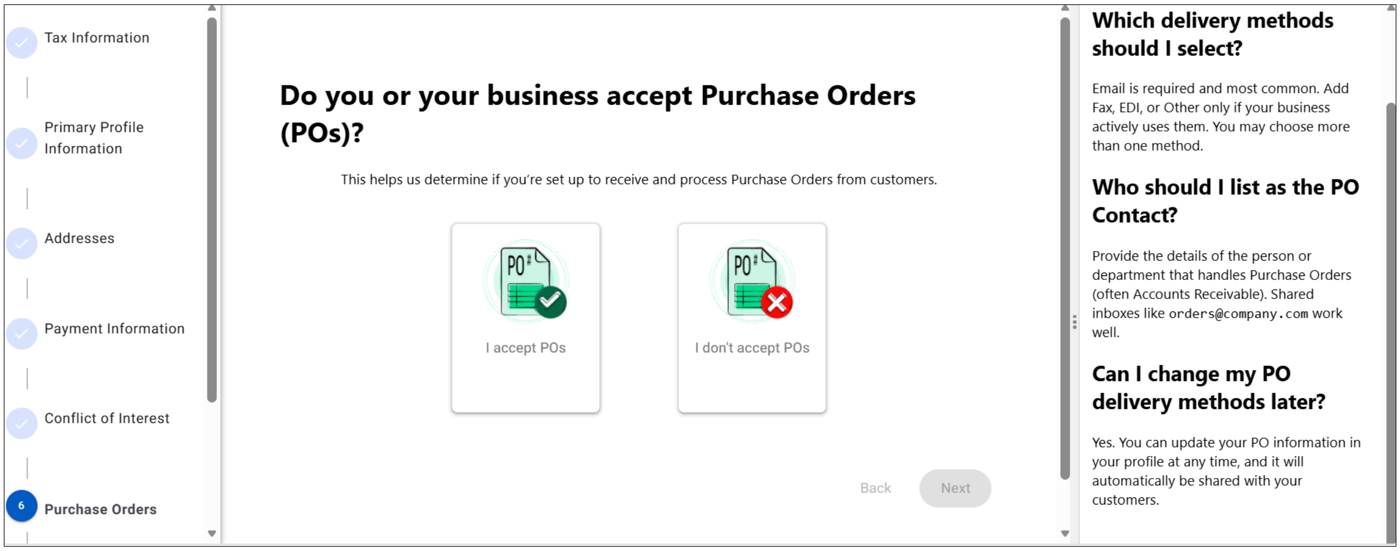
Make the appropriate selection and click **Next**.

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.

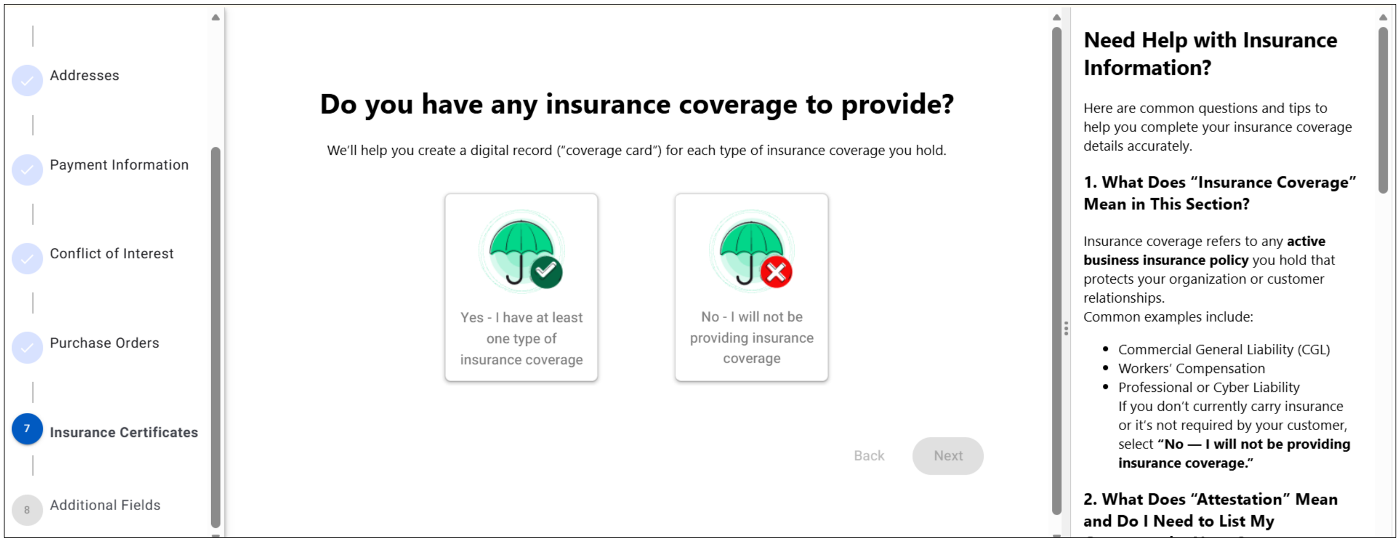


Make the appropriate selection and click **Next**.

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.

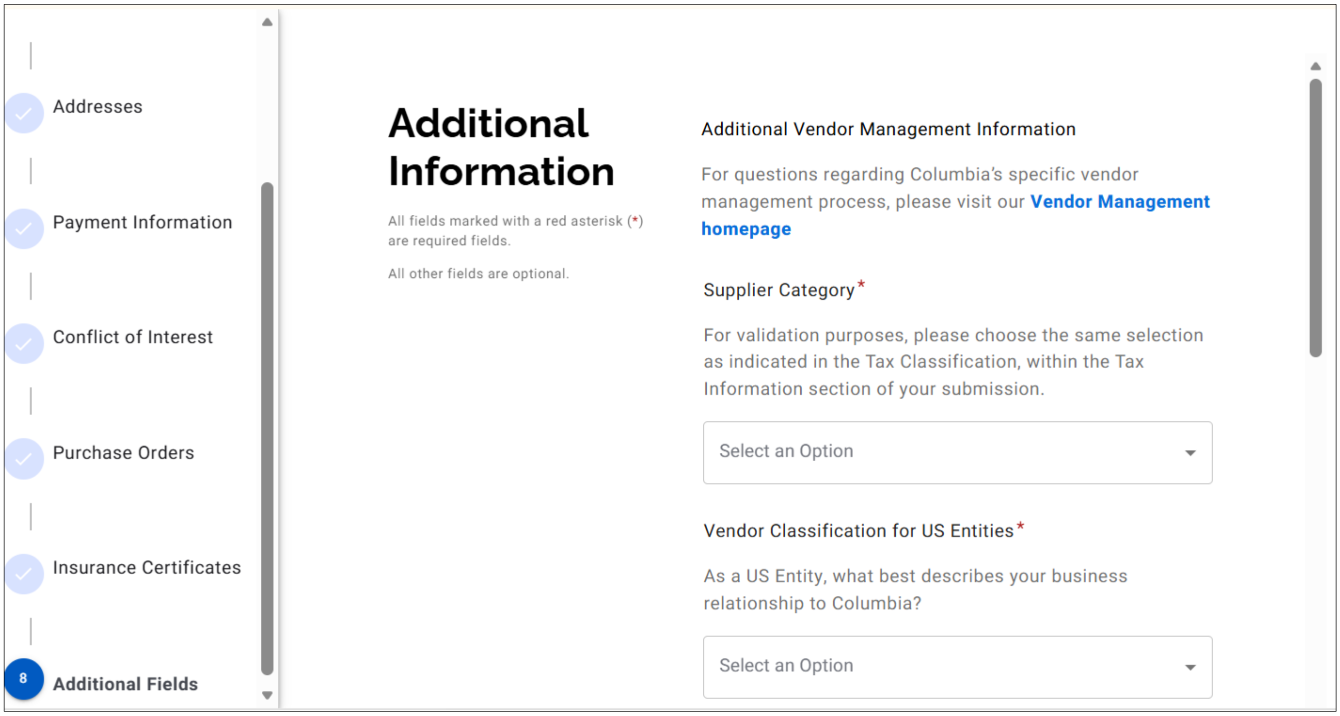


Make the appropriate selection and click **Next**.

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.



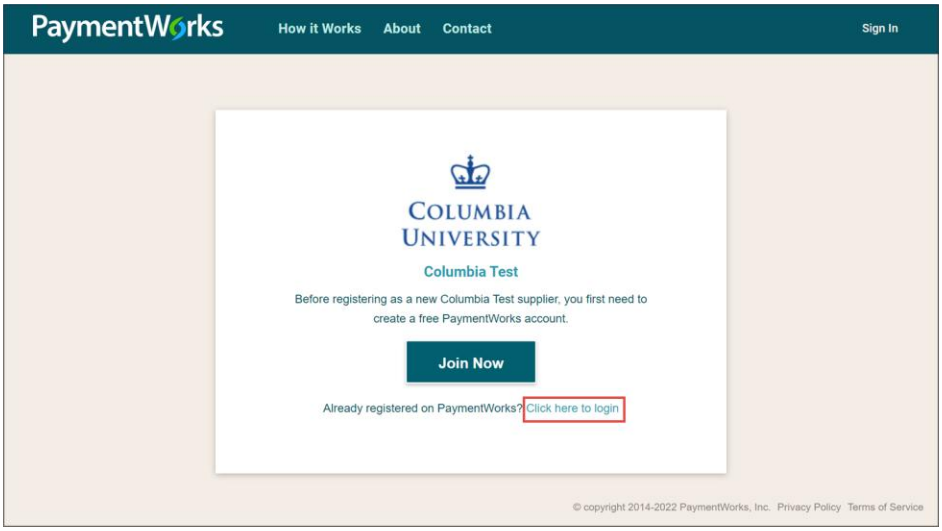
Submitting the New Vendor Registration Form

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

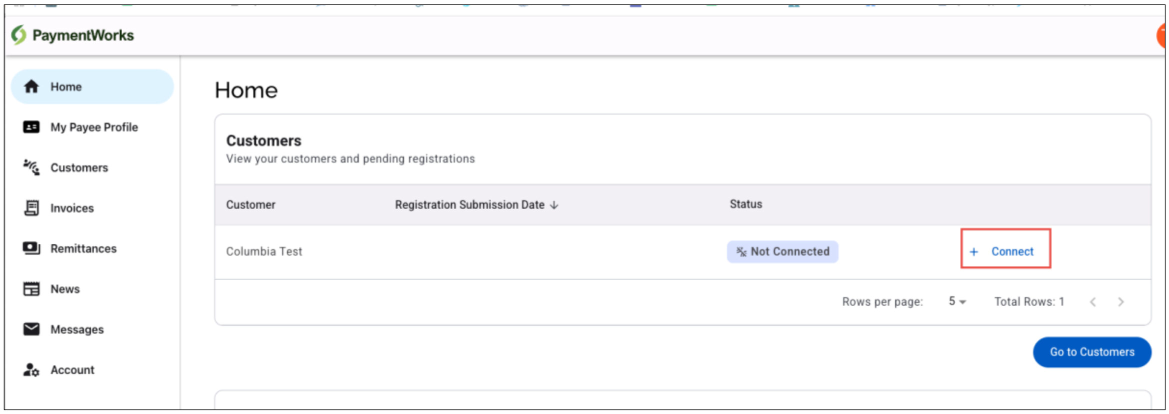
After Columbia approves your new vendor registration, you will be notified via email.

Connecting to Columbia Using Your Existing Account

If you already have an existing PaymentWorks account, you may use this account to the 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.

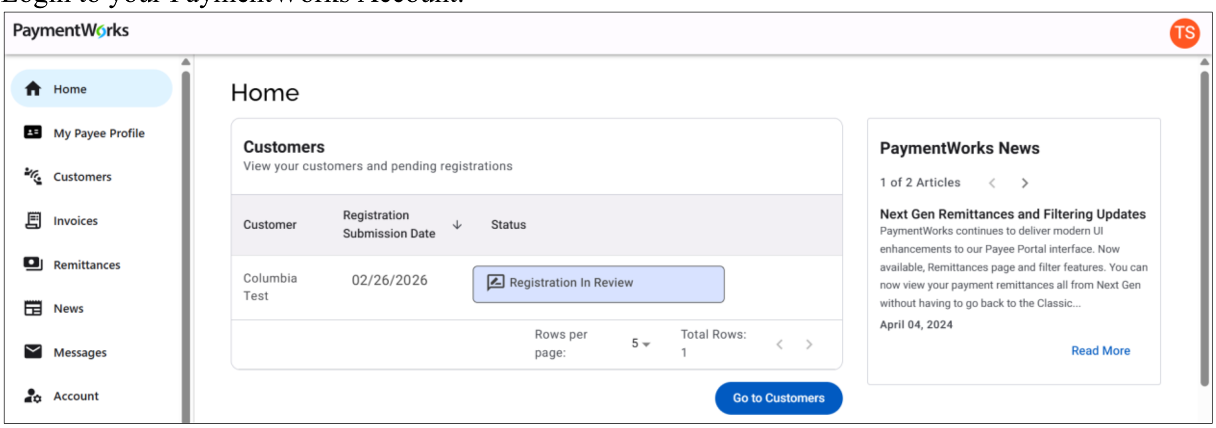


2. Click the **Connect** link for Columbia University to open and complete Columbia's New Vendor Registration form. Refer to [How to Quick Connect]() on how to connect a new customer to your existing account.

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.

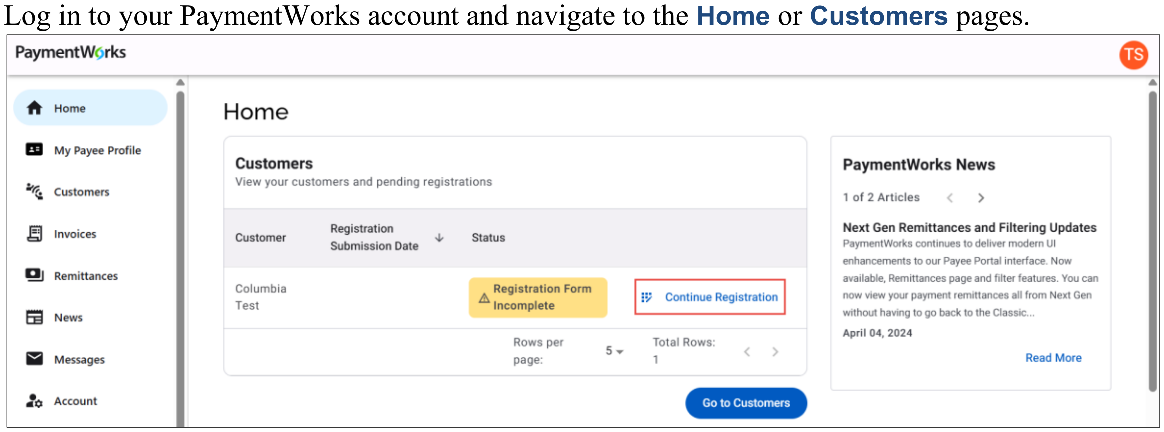


Your onboarding status appears on the **Home** or **Customers** page.

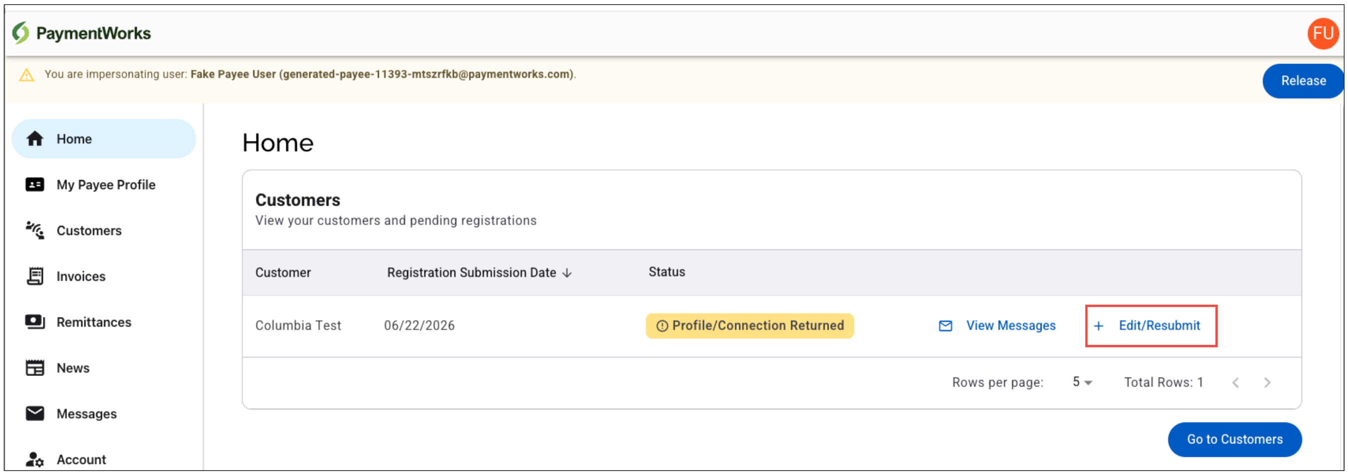
Continuing or Editing Your Registration From

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.



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

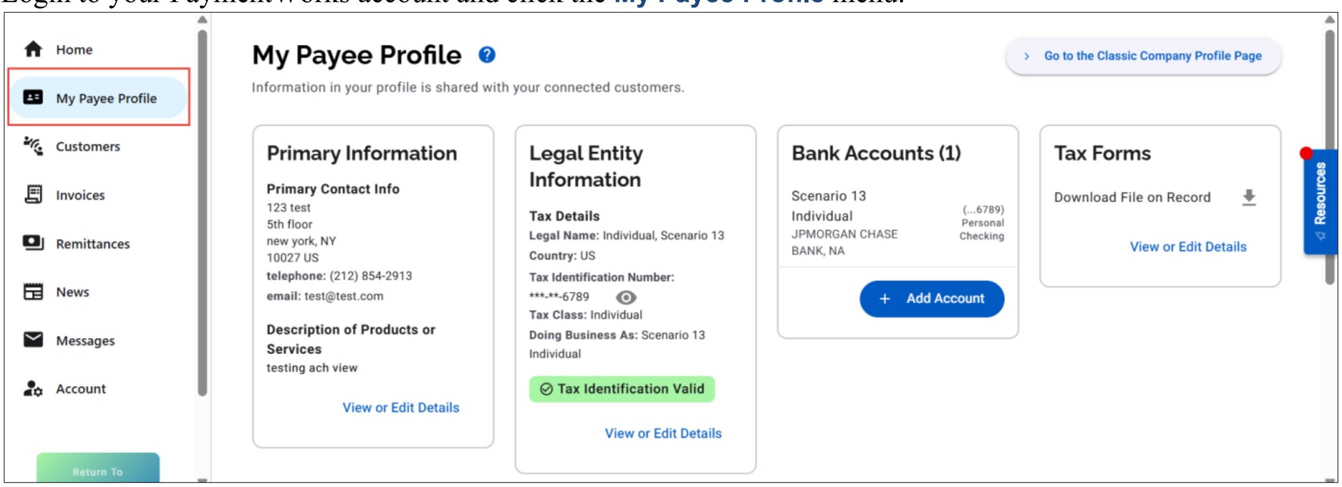
Updating Your Account Information

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.

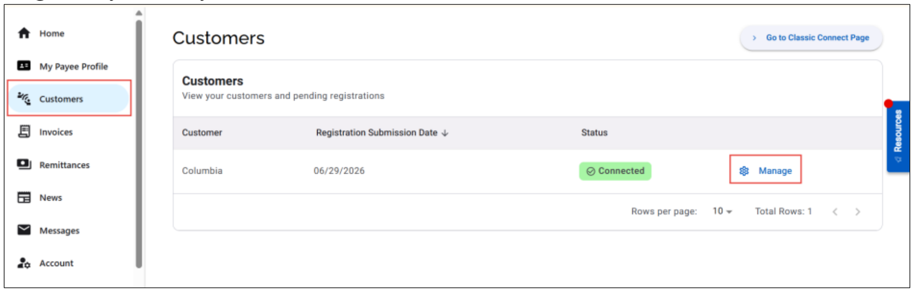
1. Login to your PaymentWorks account and click the **My Payee Profile** menu.



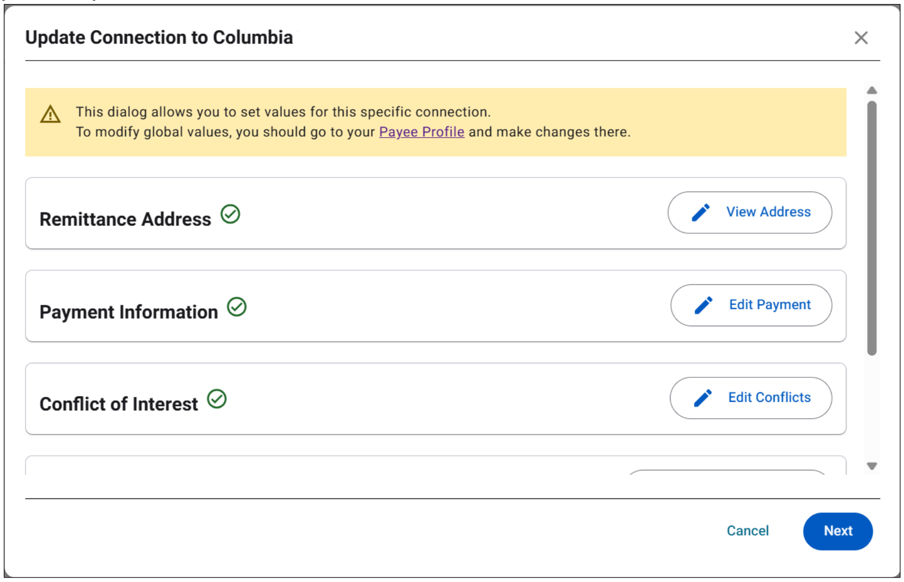
2. You can make the following edits:
   - Click one of the **View or Edit Details** links to edit the details in that section.
   - Click an **existing Bank Account** to edit that account or click the **Add Account** button to add an additional bank account.

Updating Your Columbia Specific Information

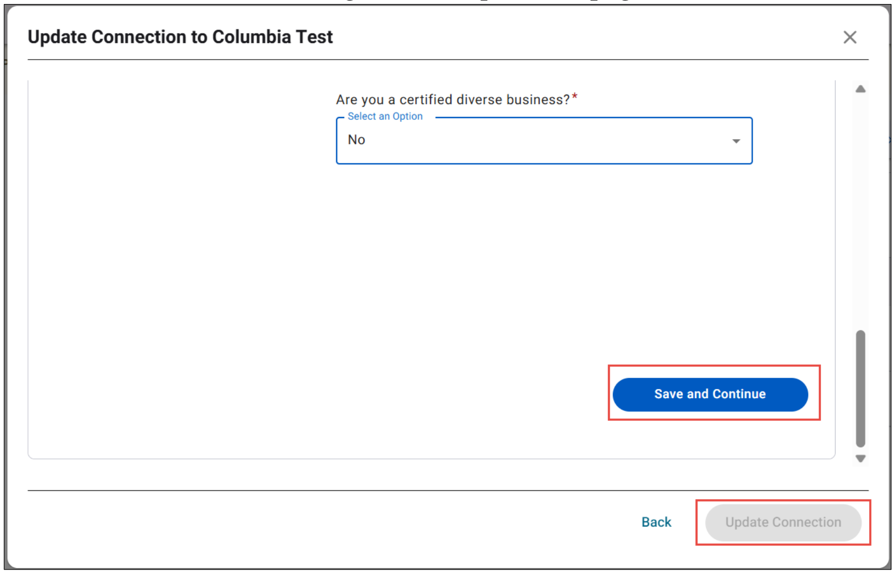
1. Login to your PaymentWorks account and click the **Customers** menu.



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



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



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.