

This guide is designed for individuals who will be receiving payments from Columbia University, such as grants or other payments types, to assist you with the vendor setup process. This guide will cover how to create a PaymentWorks account and complete key fields in the New Vendor Registration form.

For those individuals providing goods and services to the University, please refer to the [Creating a PaymentWorks Account and Registering as a Columbia University Vendor](#) job aid.

Note: *The intent of this document is act as a general guide. If you have specific questions related to taxation, you should seek out a tax professional for advice.*

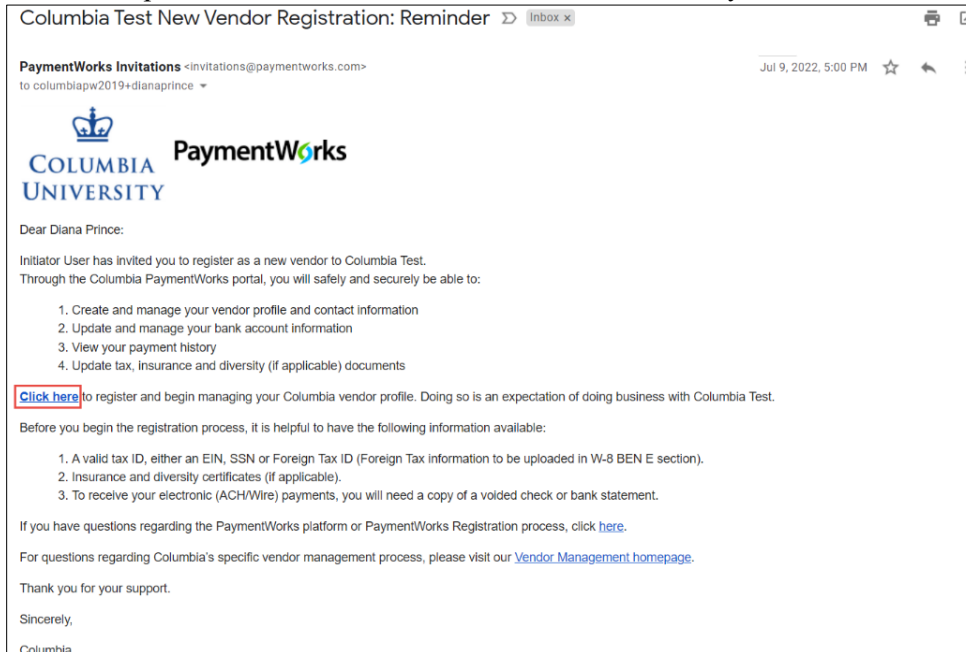
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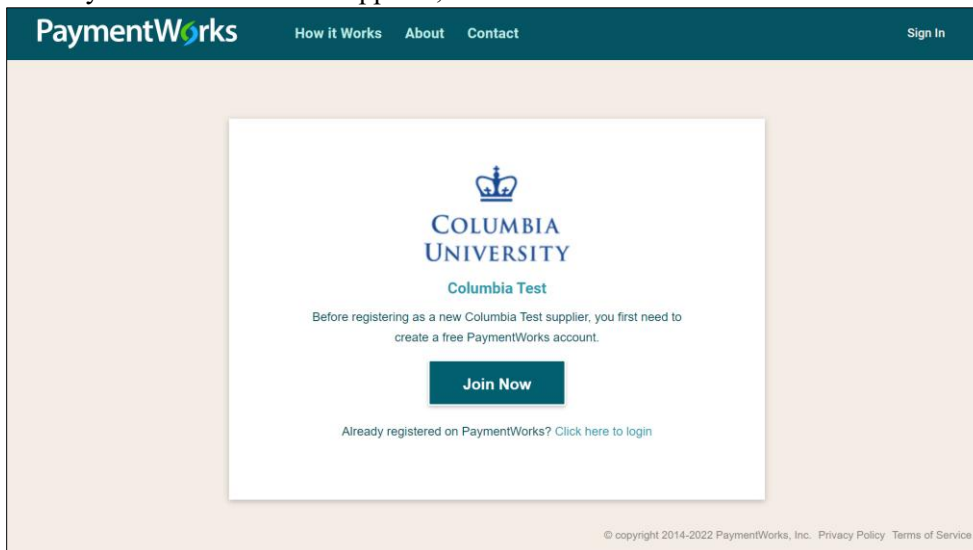
Creating a PaymentWorks Account

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 already have already registered with PaymentWorks to connect with another institution, you can log into your account from the email invitation to complete your connection to Columbia.

1. To start the process, click on the [Click Here](#) link in the email you receive.



The PaymentWorks window appears,



2. If you are already registered with PaymentWorks, click the provided link to login. Otherwise, click [Join Now](#) to create your account.
3. Complete all the fields to create your PaymentWorks account.

Payees (Suppliers)

Join PaymentWorks for Free

Your Information

 Telephone

Create Password

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

Join Now

1

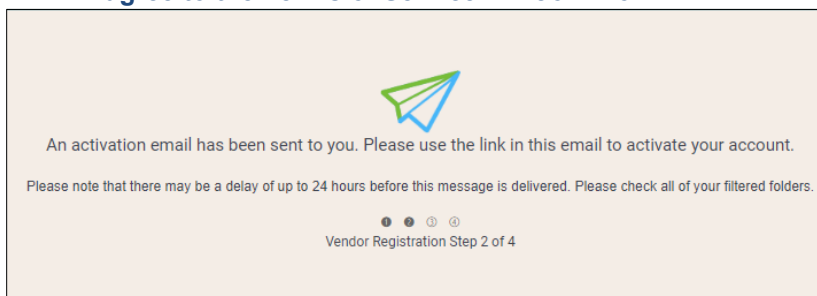
2

3

4

Vendor Registration Step 1 of 4

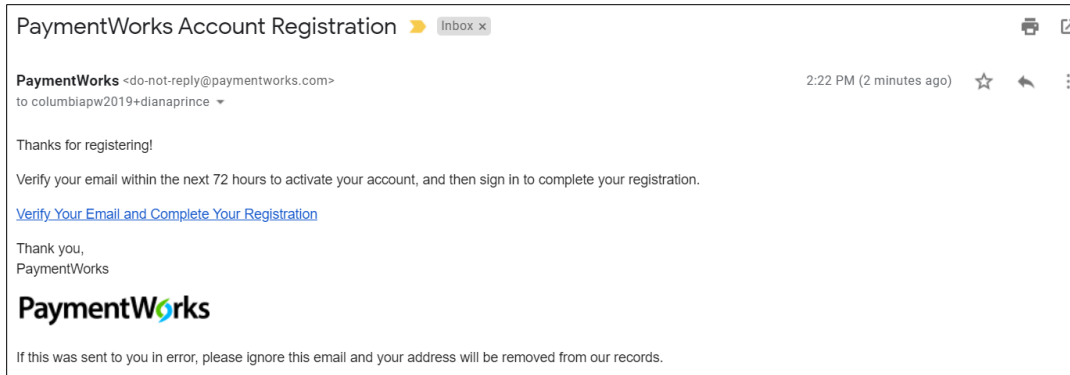
4. Click to **agree to the Terms of Service** and **Join Now**.



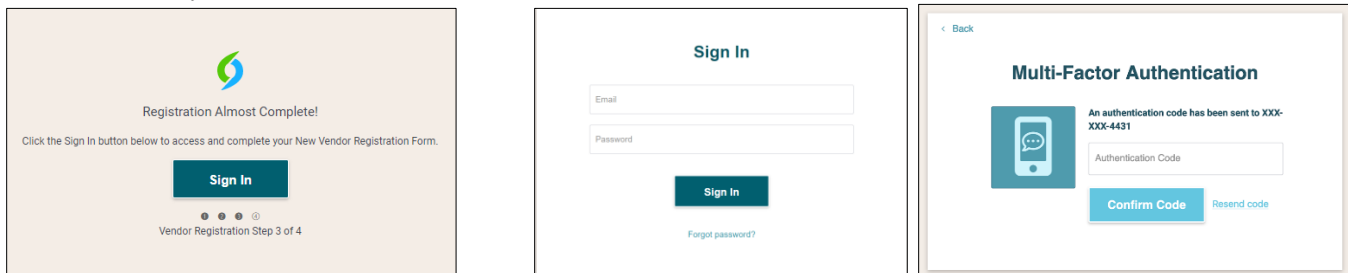
You will receive a verification email.

Columbia University Finance Training

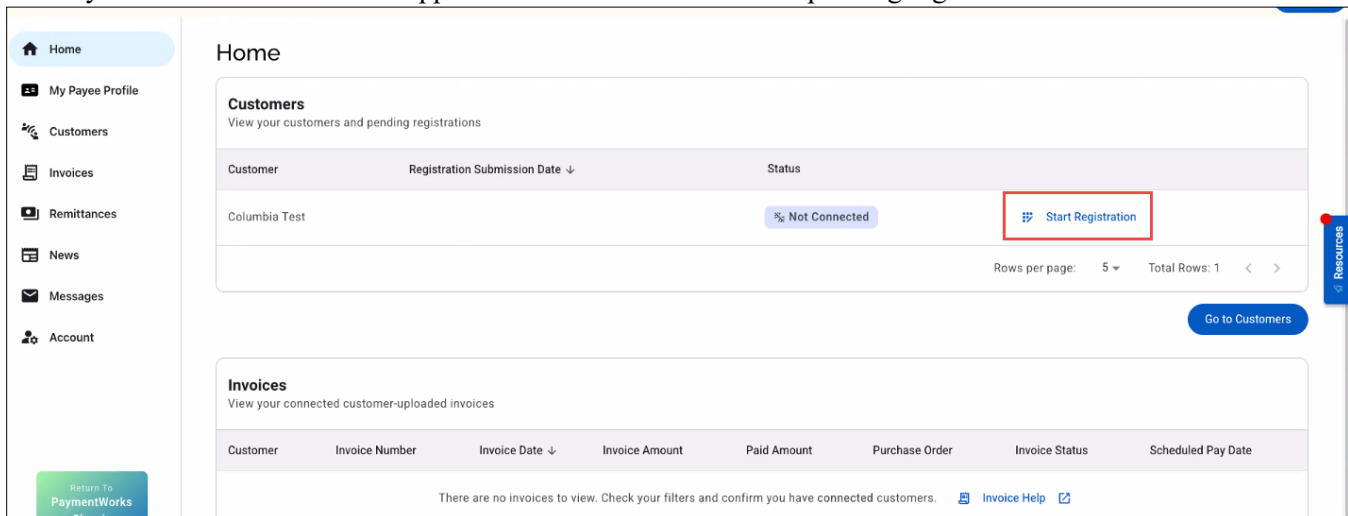
Training Guide: Registering as a Vendor for Individuals Receiving Payment or Reimbursement



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.



Click the **Start Registration** link to begin completing the New Vendor Registration from.

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

1. Select **Individual** and click **Next**.
2. Select your **Country of Origin** and click **Next**.
3. If you selected a Country of Origin outside the United States (**non-US**), select the appropriate **Tax ID Type** option.

What is your tax ID type?

Provide your tax identification number from your home country...

Non-U.S. Tax Identification Number | Individual Taxpayer ID Number (ITIN) | Social Security Number (SSN) | I do not have a tax ID

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**

4. Enter your name as it appears on your official government ID for **First Name**, **Last Name**, and **Date of Birth**.
5. If you are a US citizen or US legal resident, enter and confirm your **SSN**. If you are an international individual, enter the appropriate **Tax Number**.

Name and Social Security Number

Enter your name and Social Security Number (SSN) exactly as they appear on your tax documents. Do not enter a business EIN.

First Name * | Middle Name | Last Name * | Date of Birth * | SSN * | Confirm SSN *

Back Next

Need Help with Tax Information?

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

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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 Sole Proprietors
- **Individual Tax Identification Number (ITIN)** → Non-U.S. individuals filing U.S. taxes

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Completing W-9 or W8 Information

US Citizens and US Legal Residents:

Select the appropriate response to the question regarding **W-9 will include special entries**.

If **No**, PaymentWorks will **Generate your W-9 automatically**.

The screenshot shows a registration form for US Citizens and US Legal Residents. On the left is a vertical sidebar with five steps: 1. Tax Information (highlighted), 2. Primary Profile Information, 3. Addresses, 4. Payment Information, and 5. Conflict of Interest. The main content area is titled 'Does your W-9 include any special entries?' with 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.' (with a W-9 icon) and 'Yes, Upload your completed W-9.' (with a W-9 icon). At the bottom right are 'Back' and 'Next' buttons. On the far right is a 'Need Help with Tax Information?' sidebar with links to '1. General Tax Information Help', '2. Why Am I Being Asked for a Tax ID?', and '3. Understanding TIN Types'.

If **Yes**, you must manually complete and upload Form W-9. PaymentWorks will provide a link to the blank Form W-9 and the functionality for you to upload the completed form.

The screenshot shows the 'W-9 Certification' screen. The sidebar is identical to the previous screen. The main content area is titled 'W-9 Certification' with subtext: 'When you have a FATCA exemption code, we cannot auto-generate a W-9, so you will have to upload it manually. You may download a blank W-9 [here](#).' Below this is a blue upload button labeled 'Please upload W-9 *' and a note: 'Supports PDF or image files. File size limit is 5 megabytes.' At the bottom right are 'Back' and 'Save and Continue' buttons. The right sidebar is identical to the previous screen.

International Individuals:

Select whether you are **performing services in the US** or not and click **Next**.

The screenshot shows the 'Additional Information for Non-US Individuals' screen. The sidebar is identical to the previous screens. The main content area is titled 'Additional Information for Non-US Individuals' with subtext: 'If you will be performing services in the U.S., we need additional details to determine your tax obligations.' Below this are two options: 'I am performing services in the US' (with a US flag icon) and 'I am not performing services in the US' (with a globe icon). At the bottom right are 'Back' and 'Next' buttons. The right sidebar is identical to the previous screens.

If you selected that you are performing services in the US, you will be asked for **Passport** and **Visa** information.

Upload the correct **W-8** form. If you have specific questions, consult your tax advisor. Ensure the completed and signed forms are accurate and that your name and address on the form matches the one you entered in this New Vendor Request form.

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You are impersonating user: Fake Payee User (generated-payee-11393-maj4ulrm@paymentworks.com).

W-8 Certification

Upload your completed W-8 form to certify your tax status.

If you are a non-U.S. taxpayer, please upload your completed W-8 BEN form to certify your tax status.

You may download a blank W-8 BEN [here](#).

Please upload W-8 BEN. *

Supports PDF or image files. File size limit is 5 megabytes.

Back Save and Continue

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:

PaymentWorks provides a link to the blank Form W-8 BEN and the functionality for you to upload the completed form.

Note: If you upload a W-8 form, be sure to enter the W-8 Signature Date in the Additional Information section of this New Vendor Registration form.

Click the **Save and Continue** button after completing your Tax Information to proceed to the Primary Profile Information.

Completing Primary Profile Information

Personal Information

This information is necessary for identity verification and communication purposes.

Phone Number *
12125551212

Preferred Email *
jsmith@js.com

Website URL

Back Next

Need Help with Primary Profile Information?

Below are common questions and guidance 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.

1. What Phone Number Should I Enter?

- Individuals:** Use a phone number where you can reliably be reached—mobile or home is fine.
- Businesses:** Use a main office or verifiable business number. We will use this number to

1. Enter your **Telephone Number** and **Preferred Email**. If you have a **Website**, you can enter the URL
2. Click the **Next** button.

Description of Reason for Payment

Briefly describe the type of services you are providing or the reason you're being paid. This helps your customer understand the nature of the payment.

Payment Reason *
Deliver engineering lecture on October 1, 2024

Back Save and Continue

Need Help with Primary Profile Information?

Below are common questions and guidance 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.

1. What Phone Number Should I Enter?

- Individuals:** Use a phone number where you can reliably be reached—mobile or home

3. Enter a **Description of Reason for Payment**.
4. Click the **Save and Continue** button to proceed to the Addresses section.

Completing Addresses

Entering Your Primary Address

The screenshot shows a web form titled "Enter Your Primary Address". On the left is a vertical sidebar with a list of steps: Tax Information, Primary Profile Information, Addresses (highlighted with a blue circle and number 3), Payment Information, Conflict of Interest, Purchase Orders, and Insurance Certificates. The main content area has the title "Enter Your Primary Address" and a sub-header "Enter your primary business address. This will be used for all official correspondence." Below this are several input fields: a "Country" dropdown menu with "United States of America" selected, "Address Line 1", "Address Line 2", "City", a "State / Province / Territory" dropdown menu with "Alabama" selected, and a "Zip / Postal Code" field. At the bottom right of the form are "Back" and "Next" buttons.

1. Select the **Country** of your primary residence. For international individuals, this should be your home country.
2. Enter the **Street, City, State/Province/Region** and **Zip/Postal Code** of your primary residence.
3. Click the **Next** button.

Entering Your Remittance Address

Your **Contact Details for Accounts Receivable** and **Remittance Address** is either the address you provided your bank when you set up your bank account (if receiving payments by direct deposit or wire) or the address where you will receive payments by check (in USD). For international individuals that reside in the US, this should be your address here in the US.

The screenshot shows a web form titled "Enter Your Remittance Address". On the left is a vertical sidebar with a list of steps: Tax Information, Primary Profile Information, Addresses (highlighted with a blue circle and number 3), Payment Information, Conflict of Interest, Purchase Orders, Insurance Certificates, and Additional Fields. The main content area has the title "Enter Your Remittance Address" and a sub-header "This is the address where payments should be sent." Below this is a note: "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." There is a checkbox labeled "Same as primary address". Below this is a section titled "Enter Contact Details for Accounts Receivable" with a sub-header "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." This section contains three input fields: "Contact Name", "Contact Email", and "Contact Phone". Below this is a section titled "Enter Remittance Address" with input fields for "Address Nickname", "Country" (dropdown menu with "United States of America" selected), "Address Line 1", "Address Line 2", "City", "State / Province / Territory" (dropdown menu with "Alabama" selected), and "Zip / Postal Code". At the bottom right of the form are "Back" and "Save and Continue" buttons.

- If your Remittance Address is the same as your Primary Address above, select the **Same as primary address** option.
- If your Remittance Address is not the same as your Primary Address complete the required Address fields.
- Enter your **Contact Details**.

Click the **Save and Continue** button to move to the Payment Information 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 the bank location you have selected, different options appear. Make the desired selection.

United States

If you selected the **United States**, you have the options for:

- **ACH:** Direct deposit -preferred
- **Check:** Mailed to your address

If you select ACH, you will be asked for:

- **Account Name**
- **Routing Number**
- **Account Number**

International

If you selected an international bank location, you have the options for:

- **Wire:** Direct deposit -preferred
- **Check:** Mailed to your address

If you select Wire, you will be asked for:

- **Account Name**
- **IBAN or SWIFT/BIC**
- **Account Number**

3. Click **Next**.
4. Upload the **Bank Validation File** and click **Next**.
5. Enter the **Payment Notification Email Address** for the individual receiving payment notifications.
6. Click **Save and Continue** to progress to the Conflict of Interest section.

Completing Conflict of Interest Information

A conflict of interest occurs when you have 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 a registration form with a sidebar on the left containing a progress indicator with steps: Tax Information, Primary Profile Information, Addresses, Payment Information, Conflict of Interest (highlighted with a blue circle and number 5), and Purchase Orders. The main content area has the heading "Are you aware of any potential conflicts of interest with Columbia Test?" and a subtext: "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 are two buttons: "Yes, I'm aware of one or more conflicts" and "No, I'm not aware of any conflicts". At the bottom right are "Back" and "Next" buttons. On the right side, there is a "Conflict of Interest Help" section 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

Purchase Orders Select **I don't accept PO's**.

If you are a Vendor that will be providing goods and services to the University and will be accepting Purchase Orders, please refer to the [Creating a PaymentWorks Account and Registering as a Columbia University Vendor](#) job aid.

The screenshot shows a registration form with a sidebar on the left containing a progress indicator with steps: Tax Information, Primary Profile Information, Addresses, Payment Information, Conflict of Interest, Purchase Orders (highlighted with a blue circle and number 6), and Insurance Certificates. The main content area has the heading "Do you or your business accept Purchase Orders (POs)?" and 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" and "I don't accept POs". The "I don't accept POs" button is highlighted with a red border. At the bottom right are "Back" and "Save and Continue" buttons. On the right side, there is a "Purchase Order Information - Help" section with three sub-sections: "Which delivery methods should I select?", "Who should I list as the PO Contact?", and "Can I change my PO delivery methods later?".

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

Completing Insurance Certificates Information

Select **No, I will not be providing insurance coverage.**

If you are a Vendor that will be providing goods and services to the University where insurance may be required, please refer to the [Creating a PaymentWorks Account and Registering as a Columbia University Vendor](#) job aid.

Click **Save and Continue** to progress to the Additional Information section.

Completing Additional Information

1. Select either **US Individual** (US Citizen or US Legal Resident) or **Foreign Individual** (International individual) from the **Supplier Category** dropdown.

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If you selected **US Individual**:

You will be asked if **Are you a U.S. Citizen or U.S. Legal Resident?** If you indicate that you are a *US Legal Resident* you must upload your **US Legal Resident Document**. (US Legal Resident Card or USCIS form I-797 letter).

US Legal Resident Document*

Please upload a copy of your US Legal Resident Card or USCIS form I-797 letter.

[Choose File](#)

No file chosen

Vendor Classification for US Individuals*

As a US Individual, what best describes your business relationship to Columbia?

Select an Option

Research Study Participant

If you selected **Foreign Individual**:

A field to indicate your W-8 Signature Date appears below the Vendor Classification for Individuals dropdown and other fields that may appear. If you uploaded a W-8 form in the Tax Information section, enter the **W-8 Signature Date**.

W-8 Signature Date*

Select a Date*



- From the **Vendor Classification for Individuals** dropdown, select the item that best reflects the type of payment you are receiving from Columbia.

Vendor Classification for US Individuals*

As a US Individual, what best describes your business relationship to Columbia?

Select an Option

Choose One

- Supplier of Goods and Service
- Facilities Supplier of Goods and Service
- Reimbursement for business expense
- Honoraria recipient
- Recipient of Scholarship, Fellowship, or Stipend
- Prize or award recipient
- Subrecipient of Research Grant(Subawardee)
- Research Study Participant
- Property owner receiving rental payments from Columbia
- Return of rent, tuition, grant etc.
- Non-Qualified scholarship/fellowship
- Royalty payment (ie license, copyright, etc)
- Settlement beneficiary
- Payments to an attorney related to a settlement
- Medical healthcare payments

- Enter your Email address for **purchase document delivery** (field only appears if you selected *Supplier of Goods and Services* above). You can leave fields related to Accounts Receivable or Sales Contact Information blank if they are not relevant to you.

Please provide your email address for purchase document delivery*

Enter Email Here

Submitting the New Vendor Registration Form

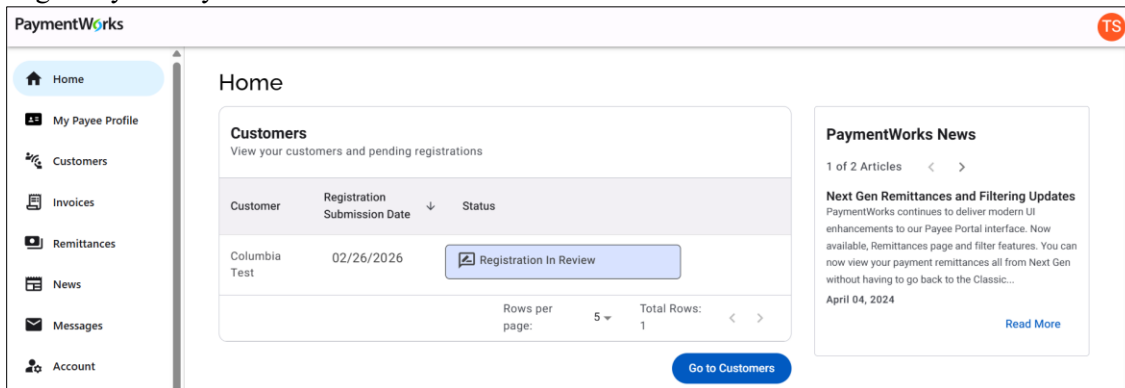
After entering all required fields in the Additional Information section, click the **Save and Continue** button.

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

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.

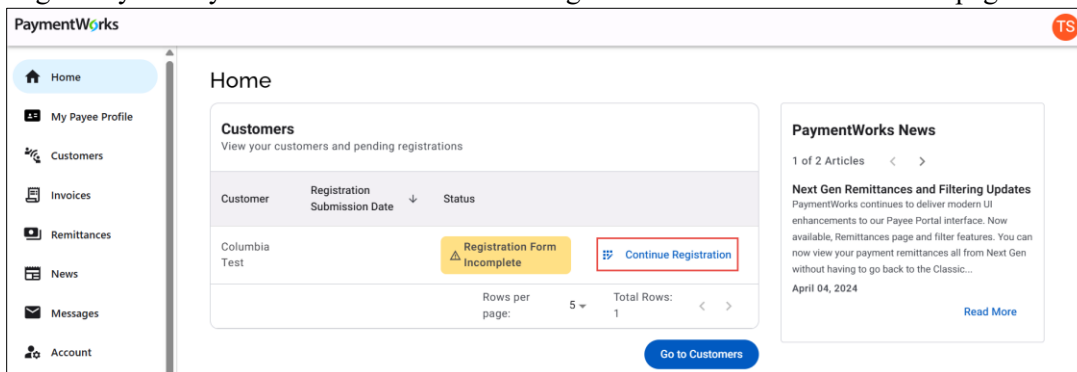


Your onboarding status appears on the **Home** or **Customers** page.

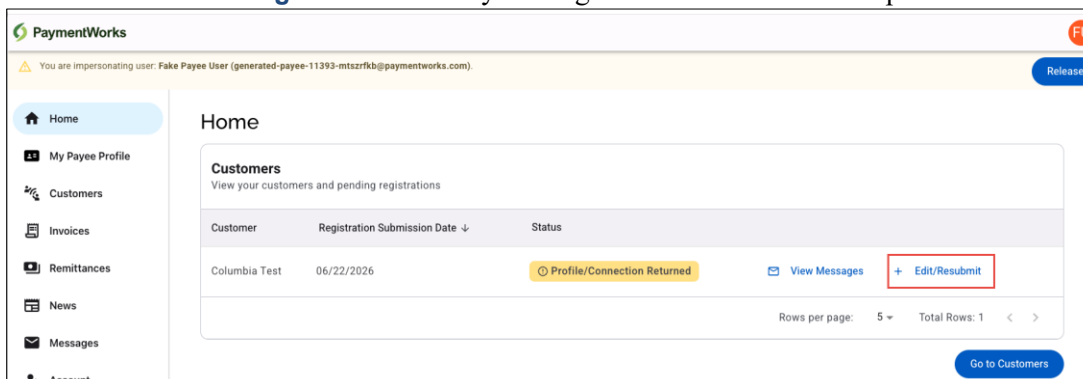
Continuing or Editing Your Registration From

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.



3. 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

Return To

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

[View or Edit Details](#)

Tax Identification Valid

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.

Home

My Payee Profile

Customers

Invoices

Remittances

News

Messages

Account

Customers

View your customers and pending registrations

Go to Classic Connect Page

Customer	Registration Submission Date ↓	Status
Columbia	06/29/2026	Connected

[Manage](#)

Rows per page: 10 Total Rows: 1

Resources

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

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Update Connection to Columbia

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.

Remittance Address ✓ [View Address](#)

Payment Information ✓ [Edit Payment](#)

Conflict of Interest ✓ [Edit Conflicts](#)

Cancel Next

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

Update Connection to Columbia Test

Are you a certified diverse business? *

Select an Option

No

Save and Continue

Back Update Connection

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