

Columbia University Finance Training

Training Guide: Registering as a Columbia University Vendor for Students (and Prospective Students)

This guide is designed for Columbia University students to assist you with the vendor setup process if you are providing services to the University, such as, but not limited to: note takers, musicians, translators, interpreters, or service providers supporting University events. This guide will cover how to create a PaymentWorks account and complete key fields in the New Vendor Registration form.

As an enrolled student, you do not need to register as a vendor in order to be reimbursed for travel and business expenses. Speak with your School or Department finance administrator to be reimbursed for expenses via Concur. However, as a prospective student requiring travel and expense reimbursement, you must register as a vendor.

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.*

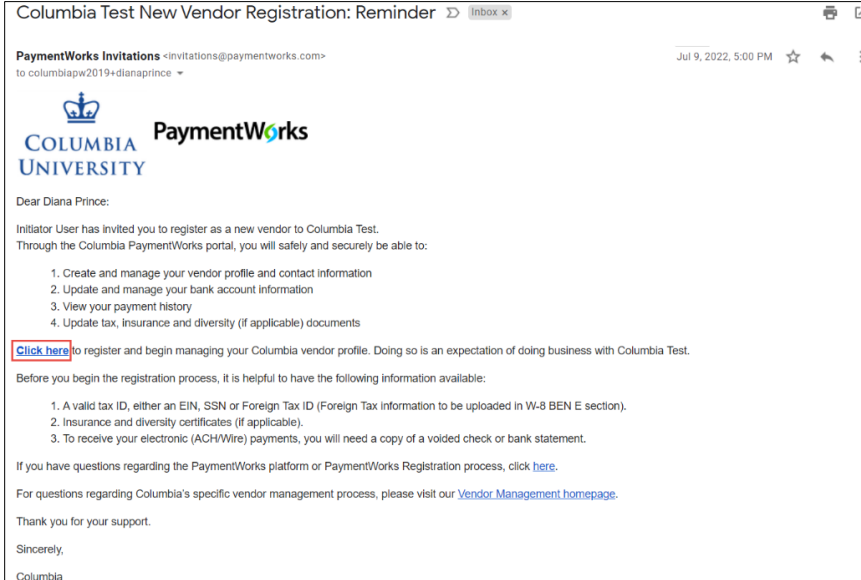
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Creating a PaymentWorks Account

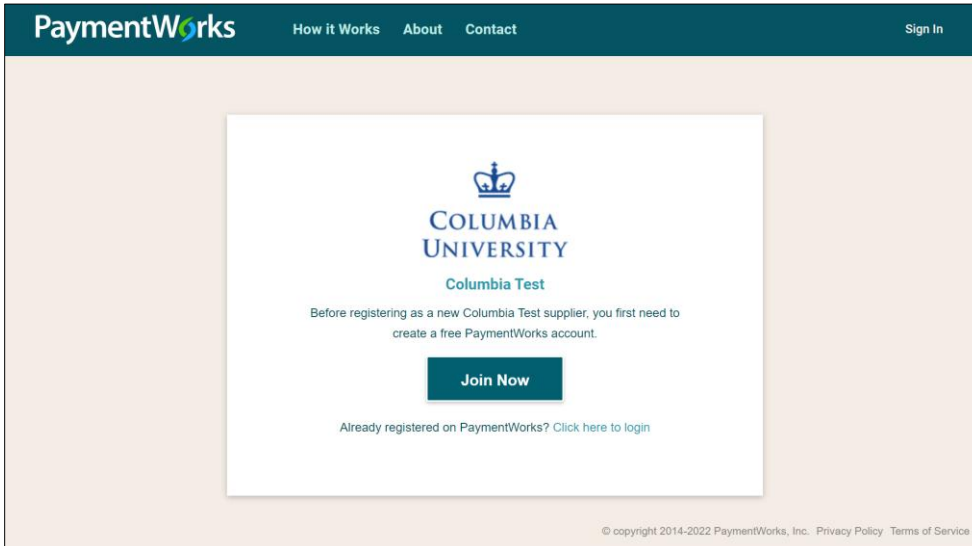
You will receive an email invitation from Columbia University asking you to create a PaymentWorks account and complete the New Vendor Registration form.

1. To start the process, click on the **Click Here** link in the email you receive.



The PaymentWorks window appears,

2. Click **Join Now**.



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

Payees (Suppliers)


Join PaymentWorks for Free

Your Information

First Name Last Name

Company Name / Doing Business As (optional)

Title

 Telephone

Email

Confirm Email

Create Password

Password

Confirm password

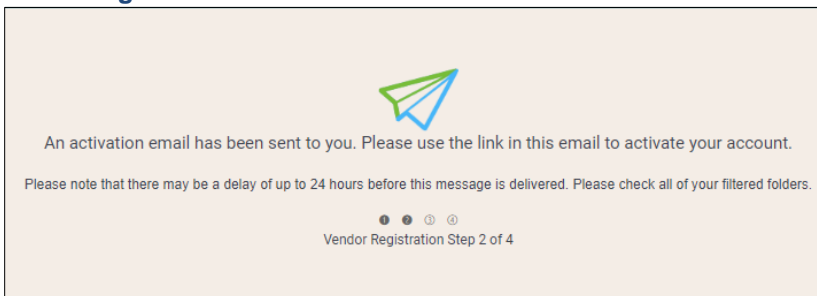
I agree to the [Terms of Service](#)

Join Now

● ○ ○ ○

Vendor Registration Step 1 of 4

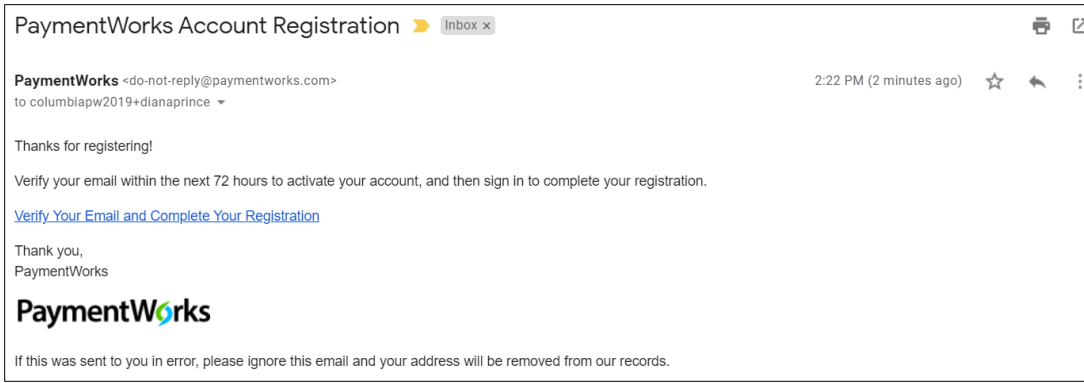
4. Click to **agree to the Terms of Service** and **Join Now**.



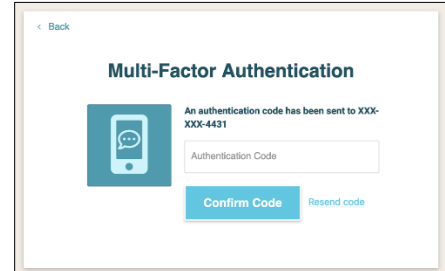
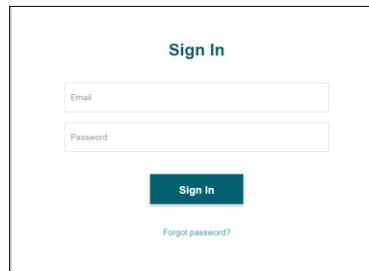
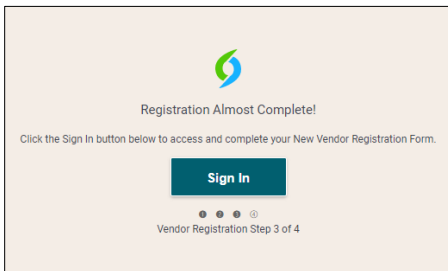
You will receive a verification email.

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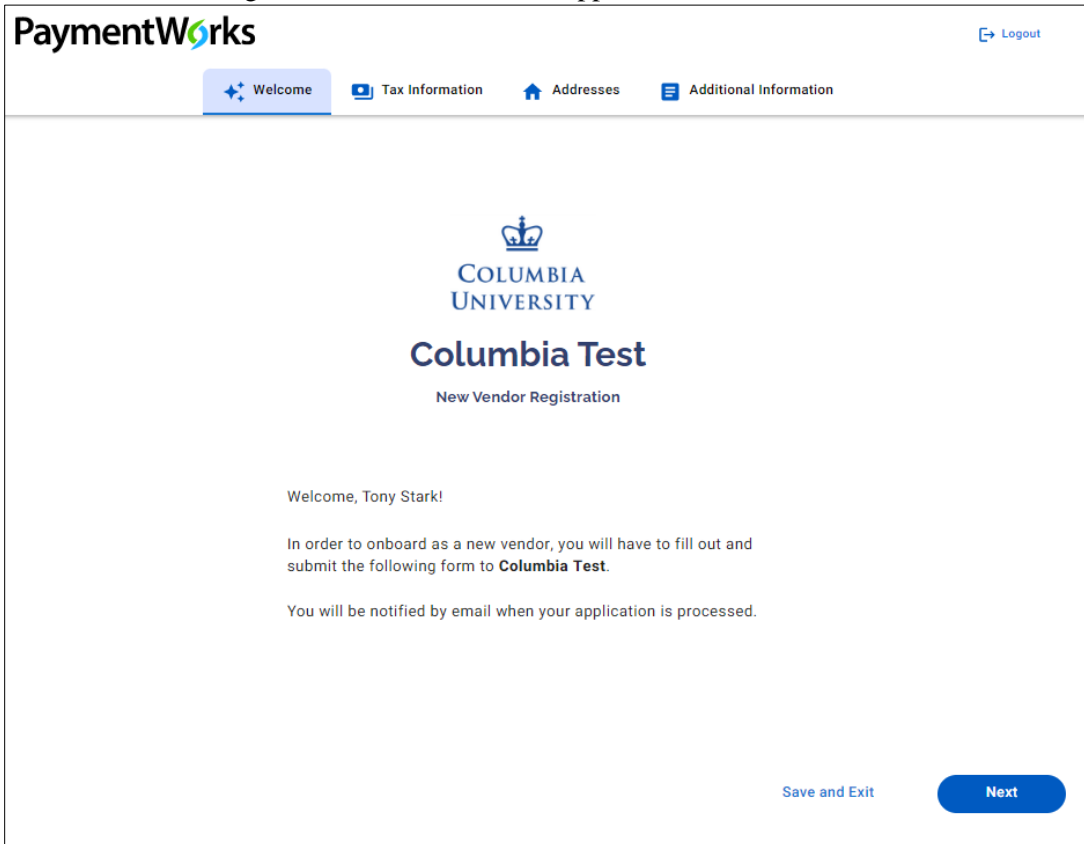
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5. From the email you receive, click **Verify Your Email and Complete Your Registration**.



The New Vendor Registration Welcome screen appears.



Click the **Next** button to begin completing the New Vendor Registration form.

Note: To access your PaymentWorks account in the future, be sure to use to the [Vendor login](#) and not the login link for Columbia employees.

Completing Tax Information

Complete all required fields in the New Vendor Registration form indicated with a red asterisk *. The steps below are designed to provide general guidance on completing key sections and fields on the form.

1. As a student, always select **Individual, Sole Proprietorship, or Single-member LLC**. Additional fields will appear on the form.
2. Select your **Country of Citizenship**.
3. If you are a **US citizen or US legal resident**, select the **SSN** (social security number) option.

If you selected a different Country of Citizenship (**International Student**), select the appropriate **TIN** (Tax Identification Number) **Type** from the dropdown.

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

Generating or Submitting Tax Forms

US Citizens and US Legal Residents:

Select **Yes** for **Generate Electronic W-9**. PaymentWorks will automatically generate the IRS tax document.

Generate Electronic W-9*

When you use PaymentWorks, we will create an IRS form W-9 for you automatically, unless you opt out. Electronic W-9's are convenient for you and provide enhanced security for your information. You may wish to opt-out of electronic W-9 generation if you have any exemptions (Section 4) or specific signature requirements (see instructions on page 4 and 5 of the W-9).

Yes
 No

Form W-9 Certifications

You have chosen to submit your Form W-9 electronically. Please confirm the following certifications:

Note: If you select No you must manually complete and upload Form W-9. PaymentWorks provides a link to the blank Form W-9 and the functionality for you to select and upload the completed form.

W-9*

An image or PDF file can be used here. A blank form can be found at this link:
[W-9](#)

[Choose File](#)

International Students:

Upload the correct **W-8** or **W-9** form. If you have specific questions regarding the appropriate form, 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.

W-8BEN or W-9*

If you are not a U.S. citizen and you are not a resident alien: upload a completed PDF or image of the W-8BEN form.

If you are not a U.S. citizen and you are a resident alien: upload a completed PDF or image of the W-9 form.

Blank forms can be found at these links:
[W-8BEN](#) [W-9](#)

[Choose File](#)

You can upload any W-8 form that applies, including a W-8BEN, W-8 ECI, W-8 IMY, W-8 EXP, or 8233. You can find tax forms [here](#). Save your form and upload as a **PDF with no editable fields**. Tax forms that contain editable fields are not allowed by the IRS and will result in having your NVR submission returned.

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.

Completing Personal Information

Personal Information

All fields marked with a red asterisk (*) are required fields.
All other fields are optional.

Your Full Name or DBA (doing business as) Business Name *

Enter your full name, or your business name as you would like it to appear on a check or other form of payment made out to you.

Enter Text Here

Telephone Number *

Please provide a phone number that is directly associated with your business. This should be a main line, office line, or other verifiable business contact number. We may use this phone number to contact you.

Enter Telephone Here ext.

Preferred Email *

Enter Email Here

Website

Enter Value Here

Description of Goods or Services

Enter Text Here

Save and Exit

1. Enter your **Full Name** as appears on your birth certificate, your **Telephone Number** and **Preferred Email**. If you have a **Website**, you can enter the URL.
2. Enter your **Description of Goods or Services** to describe the service you are providing the University.
3. Click the **Next** button to move to the Addresses tab.

Completing Addresses

Completing Your Primary Address

Welcome Tax Information **Addresses** Additional Information

Primary Address

All fields marked with a red asterisk (*) are required fields.
All other fields are optional.

Country *

United States

Street 1 *

Street 2

City *

State *

Zip / Postal Code *

Same as Primary Address

Remittance Address

All fields marked with a red asterisk (*) are required fields.
All other fields are optional.

Country *

United States

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

Completing Your Remittance Address

Your **Remittance Address** is either the address you provided your bank when you set up your account (if receiving payments by direct deposit or wire) or the address where you will receive payments by check (in USD). For international students, the address to receive payment by check must be your US address and reflect the address on your form W8.

The screenshot shows a web form titled "Remittance Address". At the top right, there is a checkbox labeled "Same as Primary Address" which is currently unchecked. Below this, there is a dropdown menu for "Country" with "United States" selected. Below the country dropdown are five input fields: "Street 1" (with a red asterisk), "Street 2", "City" (with a red asterisk), "State" (with a red asterisk and a dropdown arrow), and "Zip / Postal Code" (with a red asterisk). On the left side of the form, there is a note: "All fields marked with a red asterisk (*) are required fields. All other fields are optional." At the bottom left, the timestamp "2/23, 12:12:35 PM" is visible. At the bottom right, there are two buttons: "Save and Exit" and a blue "Next" button.

If the Remittance Address is the same as your Primary Address above, select **Same as Primary Address**.

This screenshot is identical to the one above, but the "Same as Primary Address" checkbox is now checked. The "Next" button is highlighted in blue, indicating it is the active step.

If the Remittance Address is not the same as your Primary Address complete the required fields. Your remittance address can be your address while attending Columbia University.

1. Select the **Country** of your remittance address.
2. Enter the **Street, City, State/Province/Region** and **Zip/Postal Code** of your remittance address.
3. Click the **Next** button to move to the Additional Information tab.

Completing Additional Information

The Additional Information page may initially appear blank, click the **Next** button to proceed.

Additional Information

All fields marked with a red asterisk (*) are required fields.
All other fields are optional.

Additional Vendor Management Information

For questions regarding Columbia's specific vendor management process, please visit our [Vendor Management homepage](#)

Supplier Category*

For validation purposes, please choose the same selection as indicated in the Tax Classification, within the Tax Information section of your submission.

Select an Option

Vendor Classification for US Entities*

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

Select an Option

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

Supplier Category*

For validation purposes, please choose the same selection as indicated in the Tax Classification, within the Tax Information section of your submission.

Select an Option

Choose One

- US Individual
- US Entity-C Corp
- US Entity-S Corp
- US Entity-Partnership
- US Entity-Trust/estate
- US Entity-Limited Liability Company taxed as an S Corp
- US Entity-Limited Liability Company taxed as a C Corp
- US Entity-Limited Liability Company taxed as a Partnership
- US Entity-Other
- Foreign Individual
- Foreign Entity

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).

Supplier Category*

For validation purposes, please choose the same selection as indicated in the Tax Classification, within the Tax Information section of your submission.

Select an Option

US Individual

Are you a U.S. Citizen or U.S. Legal Resident?*

Select an Option

U.S. Legal Resident

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

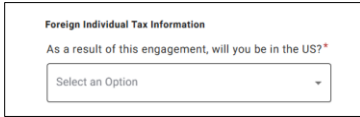
Vendor Classification for US Individuals*

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

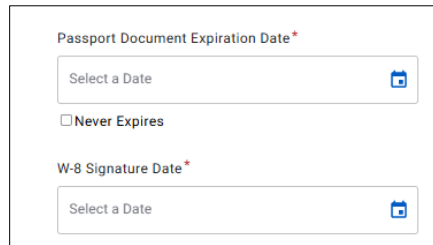
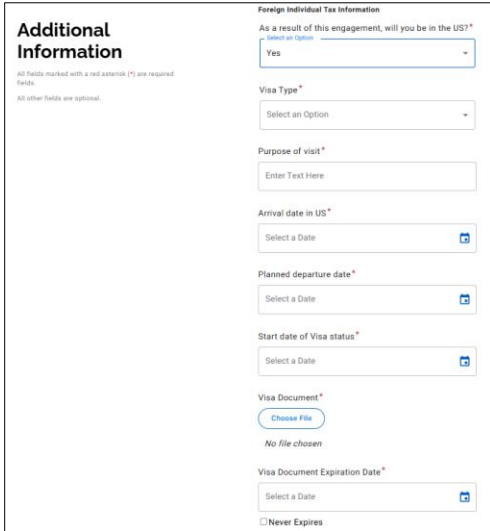
Select an Option

If you selected **Foreign Individual**:

You will be asked about **Foreign Individual Tax Information**. Indicate **Yes** to the question **Will you be performing services in the US?** if the service will be provided in the US. If you indicate Yes, the fields for the **Visa** and **Passport** information appear. Complete and upload the requested Visa and Passport information.



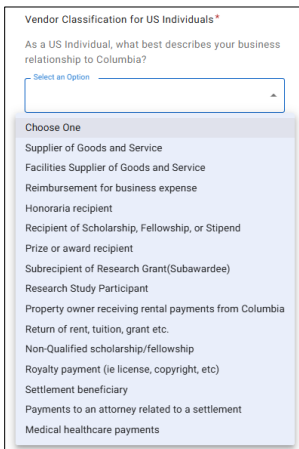
If you indicate Yes, the fields for the **Visa** and **Passport** information appear. Complete and upload the requested Visa and Passport information. If your visa type requires additional documentation, combine the visa and additional documents into a single PDF file for upload.



If you uploaded a W-8 form on the Tax Information tab, enter the **W-8 Signature Date** here.



2. Select the **Vendor Classification** role that best reflects the service you are providing (most likely Supplier of Goods and Services, but could also be Other PaymentsTypes).



Note: *If you are a current student, do not select Reimbursement for business expense. As a current student, you do not need to register as a vendor in order to be reimbursed for business expenses. Speak with your School or Department finance administrator to be reimbursed for expenses via Concur. Prospective students requiring expense reimbursement must select this option.*

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If you selected *Supplier of Goods and Services*, fields for *document delivery* and *conflict of interest* appear (steps 3 and 4 below). These fields will not appear when selecting any other Vendor Classification (skip steps 3 and 4).

3. Enter your Email address for **purchase document delivery** (field only appears if you selected *Supplier of Goods and Services* above).

Please provide your email address for purchase document delivery*

4. You can leave fields related to Accounts Receivable and Sales Contact Information blank if they are not relevant to you. Complete the **Conflict of Interest Information** fields (only appear if you selected *Supplier of Goods and Services* above).

Conflict of Interest Information

Instructions for Conflict of Interest section

If you are registering as an individual, please answer the following section on behalf of yourself only.

If you are registering on behalf of your company, please answer the following section on behalf of yourself and any other employees of your company.

Are you or are you aware of anyone at your company who is a current Columbia University employee?*

Are you or are you aware of anyone at your company who is a former Columbia University employee?*

Are you or are you aware of anyone at your company who is related to a Columbia University employee?*

5. Under **Payment Information**, select if your **Bank Location** is a US Bank or Foreign Bank.

Payment Information

Please indicate whether you will be using a US bank account or a foreign bank account to deposit your payment.

Bank Location*

Choose One

US Bank

Foreign Bank

Additional fields appear based on your selection:

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US Bank:

Select the **Payment Method** of either **ACH** (direct deposit) or **No ACH** (Check or Wire).

If you select **ACH**, you must complete the Banking Information section.

The screenshot shows a registration form with two main sections: 'Additional Information' and 'Banking Information'. The 'Additional Information' section includes a dropdown for 'Bank Location' (set to 'US Bank') and a dropdown for 'Payment Method for Payees with a US Bank Account' (set to 'ACH (Preferred)'). The 'Banking Information' section includes text input fields for 'Bank Name', 'Name on Account', 'Account Number', and 'Confirm Account Number'. A note indicates that fields with a red asterisk are required.

If you select **No ACH**, you must select either **Check** or **Wire** and provide **Check or Wire Payment Method Comments / Justification**. Selecting **Wire** will also require you to complete the Banking Information section.

The screenshot shows the 'Payment Information' section of the form. The 'Bank Location' is 'US Bank' and the 'Payment Method for Payees with a US Bank Account' is 'No ACH'. A dropdown for 'Please select a non ACH Payment Method' is set to 'Check (Additional Approval Required)'. A text area for 'Check or Wire Payment Method Comments / Justification' is visible.

Foreign Bank:

Select the **Payment Method** of either **Wire** or **Wire Not Available** (Check).

If you select **Wire**, you must complete additional Payment Information and the Banking Information section.

The screenshot shows the 'Additional Information' section of the form. The 'Bank Location' is 'Foreign Bank' and the 'Payment Method for Payees with a Foreign Bank Account' is 'Wire'. There are also fields for 'Please select your currency' and 'Are you using an intermediary bank?'. A text area for 'Beneficiary Bank IBAN Number' is visible.

If you select **Wire Not Available**, you must provide **Foreign Wire Not Available Payment Method Comments / Justification**.

The screenshot shows the 'Payment Information' section of the form. The 'Bank Location' is 'Foreign Bank' and the 'Payment Method for Payees with a Foreign Bank Account' is 'Wire Not Available'. A text area for 'Foreign Wire Not Available Payment Method Comments / Justification' is visible.

- Enter the **Beneficiary Bank IBAN**, if available, or **NA**, if not. Utilize this [website](#) to see if your bank is using IBAN. If you cannot locate the country of your bank, it is using a SWIFT code. If you enter **NA**, you must enter a SWIFT code in the Banking Information section.
- Select *Yes* or *No* if you are using an **intermediary bank**, which may be needed if international wire transfers are occurring between two banks in different countries that don't have an established financial relationship. If you select *Yes*, additional fields appear for you to enter the Intermediary Bank Details.

Completing Banking Information

The Banking Information section will only appear if you select ACH or Wire in the Additional Information section.

Banking Information

All fields marked with a red asterisk (*) are required fields.
All other fields are optional.

Bank Name*
Enter Text Here

Name on Account*
Enter Text Here

Account Number*
Enter your bank account number without spaces or dashes.
Example: 123456789012
Enter Text Here

Confirm Account Number*
Enter Text Here

Account Type*
Select an Option

1. Complete the fields as indicated.
2. Complete the **Routing Number** and **Swift Codes** based on the location of your bank:
 - For a **US Bank**, enter the **Routing Number**. Leave the SWIFT Code field blank.

Banking Information

All fields marked with a red asterisk (*) are required fields.
All other fields are optional.

Routing Number*
The routing number is a 9-digit code found on the bottom left of your checks or on your bank statements. It identifies the bank for transaction processing.
Important:
• Use the routing number designated for 'ACH' transactions to avoid payment delays.
• ACH routing numbers are often labeled as 'Electronic' or 'ACH' in your bank details.
• Do not use routing numbers labeled 'Wire' or 'International'—these are for different types of transactions.
Example Routing Number:
123456789
Enter Text Here

SWIFT Code
This code identifies your bank internationally. It should be 8 or 11 characters long.
Example: DEUTDEFF
Enter Text Here

- For a **Foreign Bank**, leave the Routing Number field blank. If you did not enter an IBAN in the Additional Information section, enter the **SWIFT Code**.

Banking Information

All fields marked with a red asterisk (*) are required fields.
All other fields are optional.

Routing Number*
The routing number is a 9-digit code found on the bottom left of your checks or on your bank statements. It identifies the bank for transaction processing.
Important:
• Use the routing number designated for 'ACH' transactions to avoid payment delays.
• ACH routing numbers are often labeled as 'Electronic' or 'ACH' in your bank details.
• Do not use routing numbers labeled 'Wire' or 'International'—these are for different types of transactions.
Example Routing Number:
123456789
Enter Text Here

SWIFT Code
This code identifies your bank internationally. It should be 8 or 11 characters long.
Example: DEUTDEFF
Enter Text Here

3. Upload your **Bank Validation File** by clicking **Choose File**. Note the criteria regarding acceptable forms of validation documents.

Banking Information

All fields marked with a red asterisk (*) are required fields.
All other fields are optional.

Bank Validation File*

Please ensure the validation file you are uploading is in English and that the bank information in it matches what has been entered on this form. The file must be an image or PDF of one of the options listed below:

- Letter on company letterhead
- Voiced check
- Voiced deposit slip
- Letter from your bank
- Copy of a bank account statement

Warning: An invalid file may cause your registration form to be returned and delay your registration approval process.

[Choose File](#)

No file chosen

Email Address for Payment Notifications*

Bank Authorization*

Customers using PaymentWorks and the financial institution named herein are authorized to automatically deposit monies to my account

I Agree

4. Enter your preferred **Email Address for Payment Notifications** and select **I Agree** to the **Bank Authorization**.

Completing the Bank Address

Bank Address

All fields marked with a red asterisk (*) are required fields.
All other fields are optional.

Country*
United Kingdom

Street 1*

Street 2

City*

State / Province / Region*
▲ This field is required

Zip / Postal Code*

[Save and Exit](#) [Submit](#)

1. Select the **Country** of your bank address.
2. Enter the **Street**, **City**, **State/Province/Region**, and **Zip/Postal Code**.

Submitting the New Vendor Registration Form

After entering all required fields, click the **Submit** button.

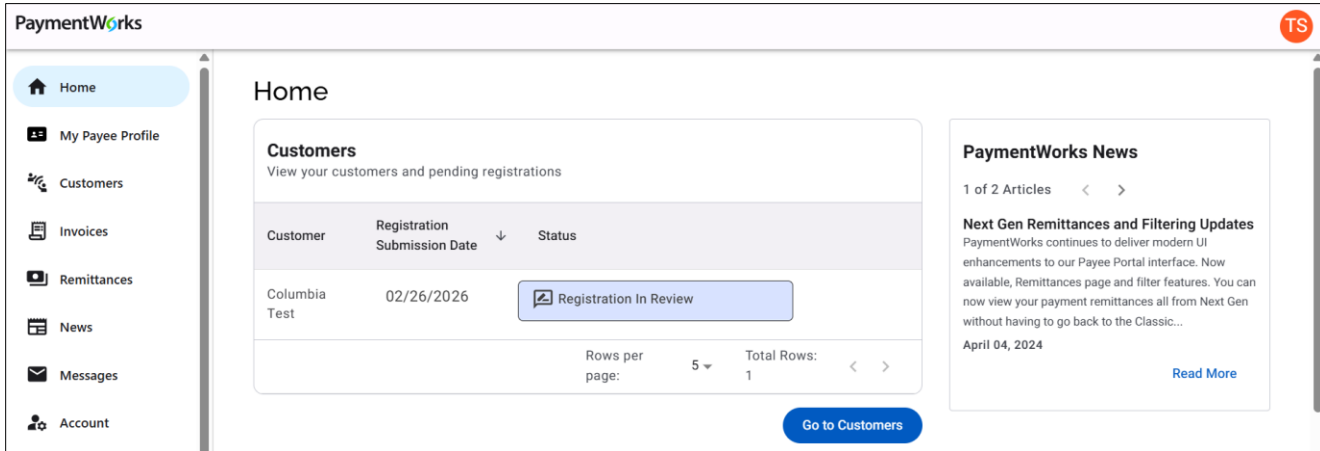
After Columbia approves your new vendor registration, you will be notified via email.

Important Note: *If your new vendor registration is returned in order to correct or acquire additional information, you must re-upload any and all required or additional documentation to the form before re-submitting.*

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.

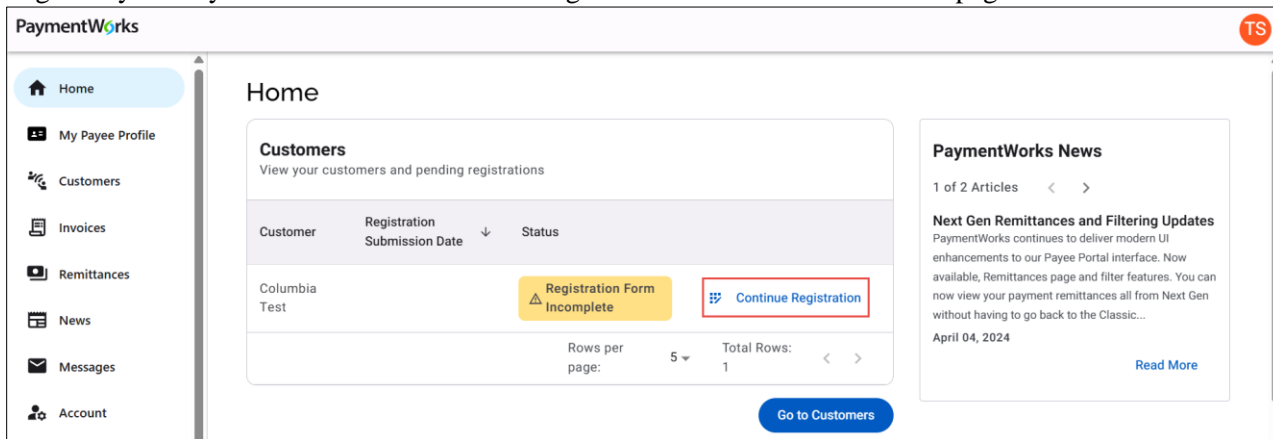


Your onboarding status appears on the **Home** or **Customers** page.

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

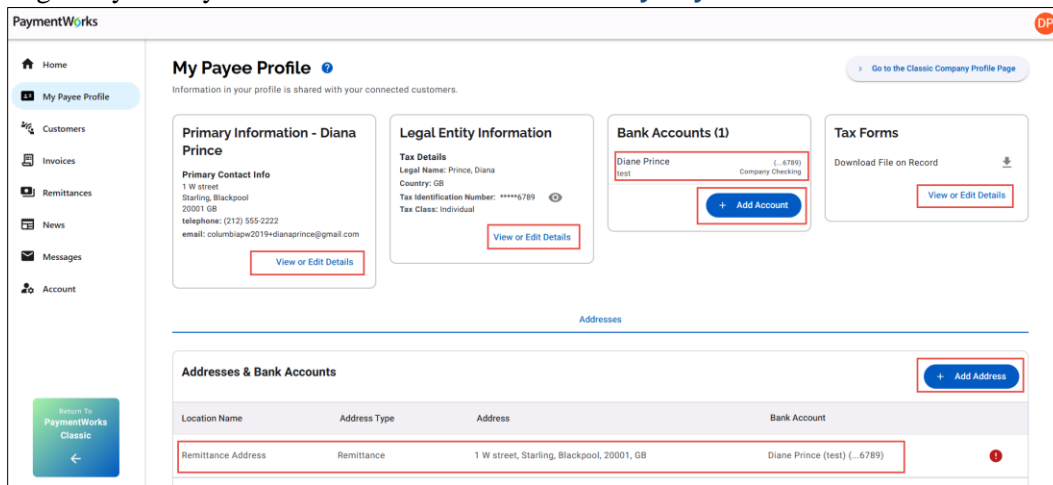
Important Note: *If your new vendor registration is returned in order to correct or acquire additional information, you must re-upload any and all required or additional documentation to the form before re-submitting.*

Updating Your 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** icon.



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.
- Click an **existing Address** to edit that address or click the **Add Address** button to add an additional address.

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