New Vendor Registration
Foreign or Non-Resident Individuals

1. Click the link in the email from PaymentWorks. If you do not see the email, please check your spam or junk folders or reach out to your payment requester to resend the invite.

![Email Image]

Dear Jack McFarland:
Initiator has invited you to register as a new vendor to SDSU Research Foundation (Test).

Hallo

In order for SDSU Research Foundation (Test) to establish you or your company as a payee or vendor, please click here to register on PaymentWorks. SDSU Research Foundation (Test)'s supplier portal.

Before you begin the registration process, be sure to have the following information available:

1. A valid tax ID (either an EIN or SSN)
2. If you wish to receive electronic (ACH) payments, you will need a copy of a voided check or bank statement.

If you have questions regarding the PaymentWorks platform or specific aspects of the registration process, please review the help documentation or contact Support here.

Thank you for your support.

Sincerely,
SDSU Research Foundation (Test)

2. Click the “Join Now” button to start the process.

If you are already registered with a different email address, please click “Click here to login,” update any old information, and notify the sender that you already have an account.

![Join Now Button Image]
3. Fill out the first step of the application and click “Join Now.”

**NOTE:** Please use the same email address the application was initially sent to.

4. After submitting part one, you will receive an activation email at the email address you entered on the previous screen.
5. Click the link in the activation email to validate your email address and be routed to the application.

![Activation Email](image1)

6. Click "Sign In" to continue the process.

![Sign In](image2)
7. Use the information you entered previously to log in.

8. Go through the application as follows:

   Click "Next" to continue.
9. As a foreign or non-resident individual, select the first option “Individual, Sole Proprietorship, or Single Member LLC.”

10. Select your Country of Citizenship.

11. Next, select “Foreign Tax ID” as the TIN type.

**NOTE:** If you do not have a TIN type, please contact PaymentWorks Support at https://community.paymentworks.com/payees/ by clicking the “Contact Support” button in the top right corner and requesting a “Placeholder Tax ID.”

12. Complete the identifying portion of the form.

13. Next, fill in your tax ID (or placeholder ID).
14. Next, complete a W-8BEN (for foreign individuals).

If you have a valid W-8BEN, click “Choose file” to upload an existing W-8BEN. **Note: W-8BEN forms expire three years after they are signed.**

If you do not have a W-8BEN, click the “W-8BEN” link to download a fillable form. Please follow the guidelines below to complete a W-8BEN form.

14.1 When completing the W8-BEN, please fill out at LEAST the following fields highlighted in yellow. Fields in blue boxes are optional if they apply to your organization. The form is only one page.
**Certificate of Foreign Status of Beneficial Owner for United States Tax Withholding and Reporting (Individuals)**

Do NOT use this form if:
- You are NOT an individual .......................................................... W-8BEN-E
- You are a U.S. citizen or other U.S. person, including a resident alien individual .............................................................. W-9
- You are a beneficial owner claiming that income is effectively connected with the conduct of trade or business within the United States (other than personal services) ................................................... W-2ECI
- You are a beneficial owner who is receiving compensation for personal services performed in the United States .................................................. W-2233 or W-4
- You are a person acting as an intermediary .................................................. W-8537

Note: If you are resident in a FATCA partner jurisdiction (that is, a Model 1 IGA jurisdiction with reciprocity), certain tax account information may be provided to your jurisdiction of residence.

### Part I Identification of Beneficial Owner (see instructions)

<table>
<thead>
<tr>
<th>1</th>
<th>Name of individual who is the beneficial owner</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Country of citizenship</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>3</th>
<th>Permanent residence address (street, apt. or suite no., or rural route). Do not use a P.O. box or in-care-of address.</th>
</tr>
</thead>
<tbody>
<tr>
<td>City or town, state or province. Include postal code where appropriate.</td>
<td>Country</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>4</th>
<th>Mailing address (if different from above)</th>
</tr>
</thead>
<tbody>
<tr>
<td>City or town, state or province. Include postal code where appropriate.</td>
<td>Country</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>5</th>
<th>U.S. taxpayer identification number (SSN or ITIN), if required (see instructions)</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>6a</th>
<th>Foreign tax identifying number (see instructions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>6b</td>
<td>Check if ITIN not legally required</td>
</tr>
</tbody>
</table>

| 7 | Reference number(s) (see instructions) |

### Part II Claim of Tax Treaty Benefits (for chapter 3 purposes only) (see instructions)

| 9 | I certify that the beneficial owner is a resident of .................................................. within the meaning of the income tax treaty between the United States and that country. |

10 **Special rates and conditions** (if applicable—see instructions): The beneficial owner is claiming the provisions of Article and paragraph ______ of the treaty identified on line 9 above to claim a ______% rate of withholding on (specify type of income).

Explain the additional conditions in the Article and paragraph the beneficial owner meets to be eligible for the rate of withholding:

### Part III Certification

Under penalties of perjury, I declare that I have examined the information on this form and in the best of my knowledge and belief it is true, correct, and complete. I further certify under penalties of perjury that:

- I am the individual that is the beneficial owner (or am authorized to sign for the individual that is the beneficial owner) of all the income or proceeds to which this form relates or am using this form to document myself for chapter 4 purposes.
- The person named on line 1 of this form is a U.S. person;
- This form relates to:
  - (a) income not effectively connected with the conduct of a trade or business in the United States;
  - (b) income effectively connected with the conduct of a trade or business in the United States but is not subject to tax under an applicable income tax treaty;
  - (c) the partner's share of a partnership's effectively connected taxable income; or
  - (d) the partner's amount realized from the transfer of a partnership interest subject to withholding under section 1446(f);
- The person named on line 1 of the form is a resident of the treaty country listed on line 8 of the form (if any) within the meaning of the income tax treaty between the United States and that country; and
- For broker transactions or credit exchanges, the beneficial owner is an exempt foreign person as defined in the instructions.

Furthermore, I authorize this form to be provided to any withholding agent that has control, receipt, or custody of the income of which I am the beneficial owner or any withholding agent that can disburse or make payments of the income of which I am the beneficial owner. I agree that I will submit a new form within 30 days if any certification made on this form becomes incorrect.

**Sign Here**

- I certify that I have the capacity to sign for the person identified on line 1 of this form.
- Signature of beneficial owner (or individual authorized to sign for beneficial owner)
- Date (MM-DD-YYYY)
- Print name of signer

For Paperwork Reduction Act Notice, see separate instructions.
14.2 After you fill out the W-8BEN and save the file on your computer, upload the completed form by clicking "Choose File" and select the appropriate file to upload.

15. Next, complete the Personal Information section. Please enter your full legal name here.

Hit "Next" in the bottom right corner of the screen to continue.
16. Next, complete the Primary Address section. (This is where your tax documents will be sent). **Note:** This address must be the same as on the W-8BEN.

17. Next, complete the Remittance Address section. Click the “Same as Primary Address” box, since check payment option is not available for foreign individuals unless you are in the US and will be picking the check.

Hit “Next” again to continue.

18. Next, select Yes or No for the question “Are you a SDSU/SDSURF student or employee?”

**Note:** If your answer is “Yes,” enter a valid 9-digit RedID or Employee ID.

19. Next, for the Supplier category, select “Foreign Individual.”

20. Next, for the question “Do you accept credit cards?” select “No.”

21. Next, for the question “Do you accept Purchase Orders?” choose the one that applies to you.
22. Next, choose Yes or No for the “Will you be performing services in the US?” question. If you chose “Yes,” you will be required to provide the following information and documents:

- Visa type
- Arrival date
- Planned departure date
- Visa start date
- Copy of Visa to upload
- Visa expiration date (if applicable)
- Passport number
- Copy of passport to upload
- Passport expiration date (if applicable)
- IRS form 8233 upload (if applicable)
23. Next, choose your “Bank Location” and “Payment Method.”

If you select **US Bank Account**, you can choose ACH (direct deposit) or Check.

If you choose ACH (direct deposit, under US Bank) you will need to fill out the banking information that follows this section.

**Note: Only domestic US banks can be used for direct deposit payments.**

If you wish to receive a wire transfer to a foreign bank, please select “Foreign Bank” and then “Wire” as your payment method. Skip to Step # 31 for additional instructions.

24. Then, complete the Banking Information.

25. Next, upload a bank validation file. You will be required to provide banking information and supporting documentation to verify and validate your account information.
26. Next, provide an email address to receive payment notifications, and click the "I Agree" box to authorize PaymentWorks to send electronic payments.

27. Lastly, provide the bank address.

28. Once completed, click the "Submit" button at the bottom right corner.

You will see this once submitted.

Over the next week, please check your spam / junk mail for any additional communications from PaymentWorks.
Another option for Banking Location and Payment Method from Step 22:

29. If you select Foreign Banks, you can choose Wire or Check.

Only select “Check” if you are in the US to pick up the check. Otherwise, select “Wire.”

If you select “Check” (under Foreign Bank), there will be no more information to provide. Please click the “Submit” button to fully submit the application.

If you select “Wire” (under Foreign Bank), you will be required to provide banking information and supporting documentation to verify and validate your account information.

30. Then, click the “Submit” button to fully submit your PaymentWorks registration.

After your application is fully approved, you will receive an email with your vendor ID number and a link to a Wire Transfer form to complete your foreign banking information. Your payment cannot be processed until this Wire Transfer form is completed.