Payee Walkthrough to Join PaymentWorks

Step 1: The Payee Receives the Invitation

As the payee, you will receive a PaymentWorks invitation, similar to the screenshot (right). This message contains a special link for you to click to begin the process.

Step 2: Joining PaymentWorks

When the payee (you) clicks the link, you will be directed to a screen that invites you to join PaymentWorks (screenshot on the right).

If you are new to PaymentWorks, you will click the Join Now button to create your PaymentWorks account.

If you have an existing account on PaymentWorks, you will click the Click here to login link and enter your login information for your existing account.
Account Creation Page: 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.

After submitting part one, you will receive an activation email at the email address you entered on the previous screen.
Click the link in the activation email to validate your email address and be routed to the application. An account is not activated until the email address is verified. In addition, after the email address and account are verified, no one else will be able to respond to that invitation.

Click **Sign In** to continue the process.

Click the Sign In button below to access and complete your New Vendor Registration Form.

Use the information you entered previously to log in.
Step 3: The New Vendor Registration Form

After you have joined PaymentWorks and verified your email address, you will be brought to SDSURF’s New Vendor Registration form.

As the payee, you will provide your address, your tax information such as EIN (for businesses), SSN (for individuals), Foreign Tax ID (for foreign businesses or foreign individuals), as well as a W-9 form (or W-8 for foreign payees).

If you have already submitted a New Vendor Registration form for another PaymentWorks customer, the form will be pre-populated with your existing information.

SDSURF payees or vendors are encouraged to submit bank account information to enable electronic or direct deposit payments. Direct deposit payments are required for SDSU or SDSURF employees and students.

Step 4: Approval of the New Vendor Registration Form

After you have submitted the registration form, SDSURF Accounts Payable department will review and approve the submission. After approval, you will be assigned a vendor number or ID (if new) or connected to an existing vendor ID. PaymentWorks will notify you of your approval and vendor ID via email.