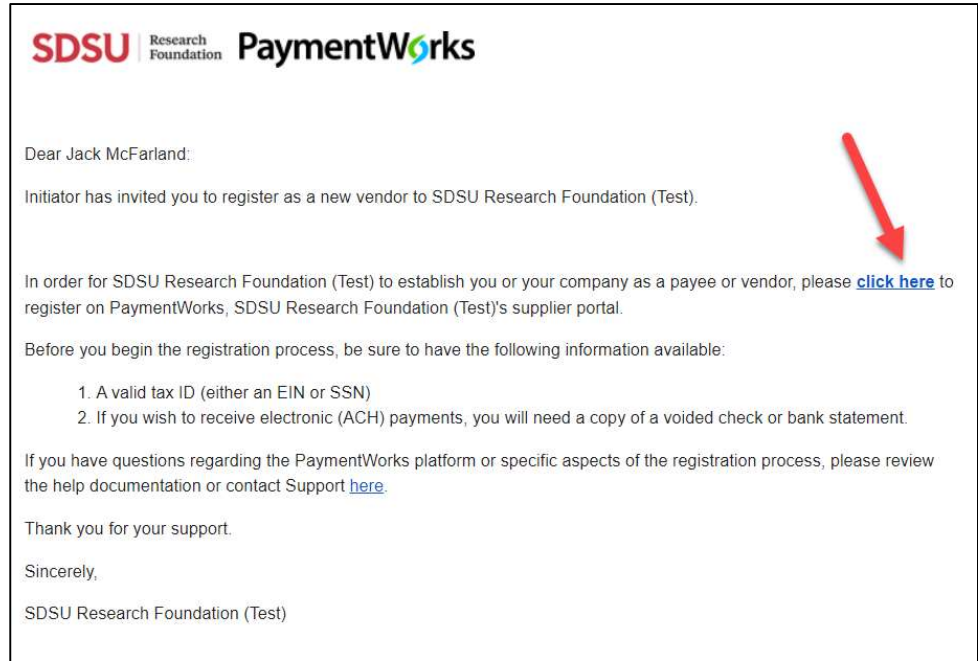


Payee Walkthrough to Join PaymentWorks

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.


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

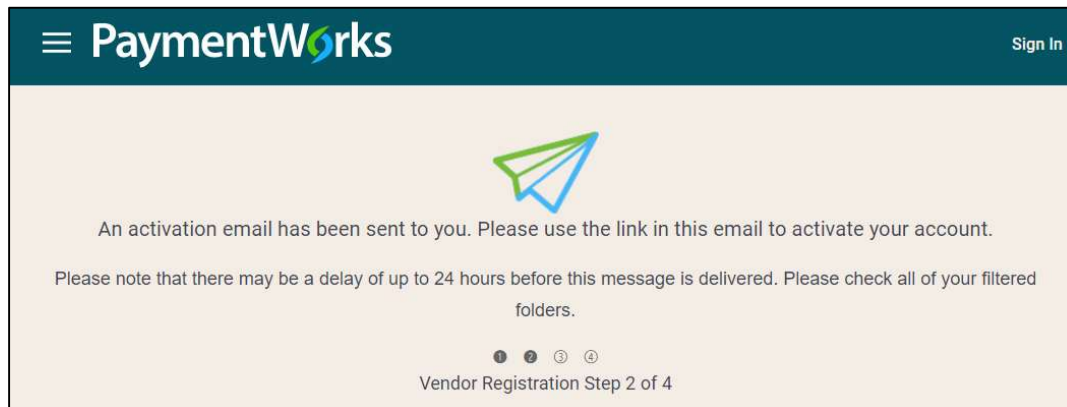
I agree to the [Terms of Service](#)

 **Join Now**

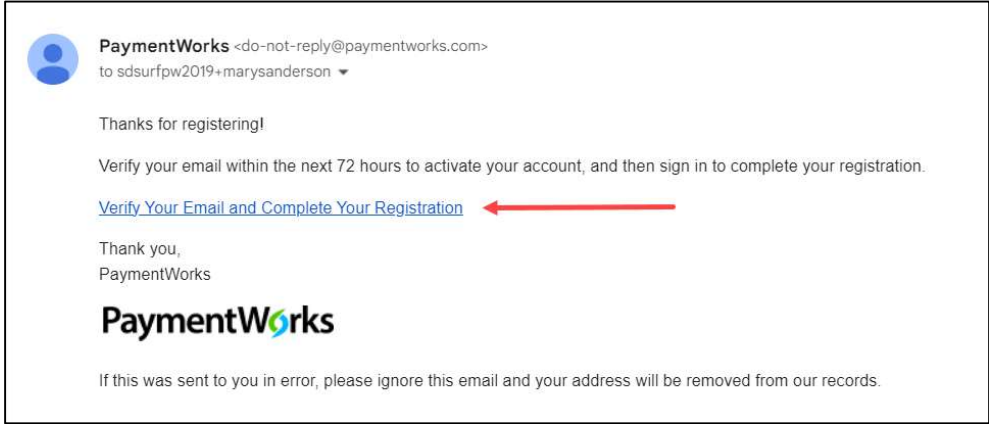


Vendor Registration Step 1 of 4

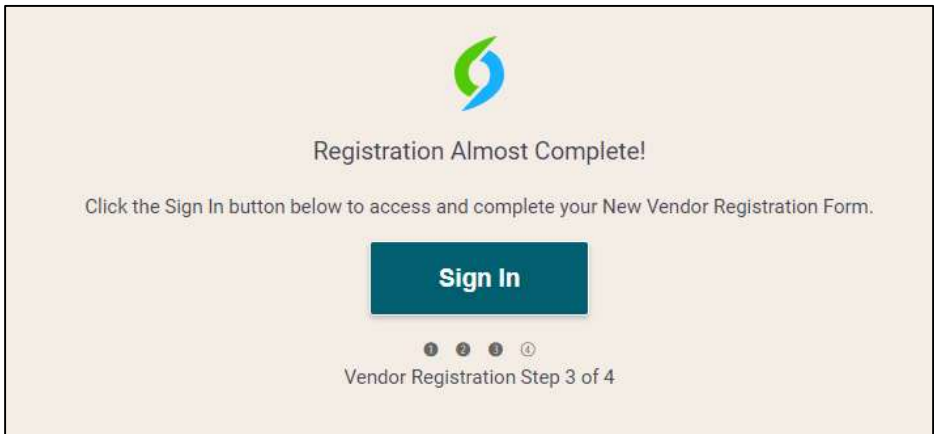
After submitting part one, you will receive an activation email at the email address you entered on the previous screen.



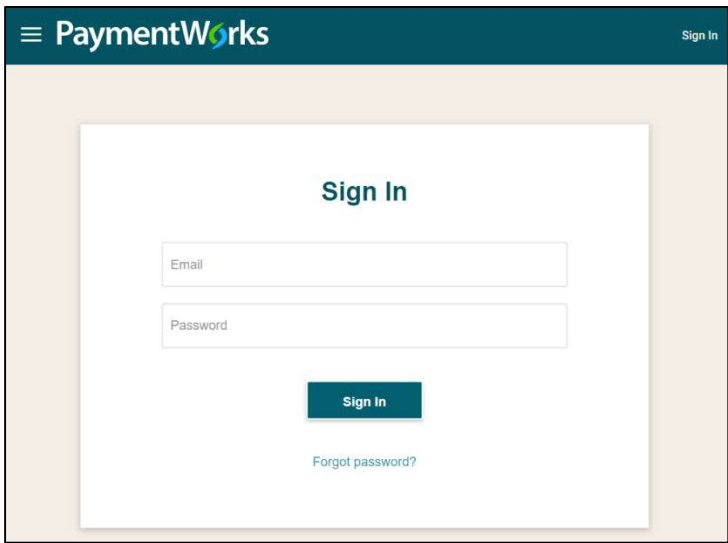
Click the link in the activation email to validate your email address and be routed to the application. An account is not activated until the email address is verified. In addition, after the email address and account are verified, no one else will be able to respond to that invitation.



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



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.

The screenshot shows a web form titled "San Diego State University Research Foundation (Test) New Vendor Registration". At the top left is the SDSU Research Foundation logo. The main heading is "San Diego State University Research Foundation (Test)" with the subtitle "New Vendor Registration". The form content includes a welcome message to Sarah Sanderson, instructions to fill out the form, and a notification that the user will be notified by email. Below this is a section for "Tax Information" with a heading and two radio button options: "Individual, Sole Proprietorship, or Single-member LLC" and "Corporation or other complex business entity". To the right of these options is the question "For tax purposes, which best describes you?". Below the tax information is a section for "Primary Address" with a heading and a dropdown menu for "Country" (set to "United States"). Below the country dropdown are two text input fields for "Street 1" and "Street 2", both with "Enter Text Here" placeholder text. Small text below the headings indicates that fields with an asterisk are required.

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.