

# Inviting a New Supplier Through PaymentWorks

Before proceeding with the invite, does your invitee fall under any of these categories? If the answer is, "yes", go to the job aid for 'Creating a Non-Po Upload'.

## Non-PO Upload should be used to pay individuals for:

- Human subject payments to participants and the Principal Investigator
- Special Government Payments
- Non-employee refunds and Patient refunds
- Non-qualifying scholarships (formerly stipends)
- Travel and Business Expense Reimbursement for Students and Non-Rutgers/Visitor
- Petty Cash (*pending Accounting approval*)
- Awards/Prizes
- Royalties
- Legal Payments (OGC USE ONLY)
- **Please note** - if the type of request falls under Non-PO Upload, but is for a non-US resident (*specifically without a US address*), then the individual will need to be setup thru PaymentWorks as a Supplier. The department will need to submit a Check Request and [International Wire Transfer](#) instead for payment. If a person receives a Rutgers paycheck, contact Payroll. This includes student workers, class 5 only.

- Go to the [myRutgers](#) portal and search for '[Supplier Portal](#)' to gain access to PaymentWorks. You can also access the portal page [here](#).

- **READ THE ENTIRE PAGE. Some of the information must be discussed with the supplier PRIOR to sending the Invite.**

- Is the supplier already in the system or is there another supplier already in the system that can provide the goods or service? Make sure to search before inviting.

- **Before** sending the invite, make sure to discuss the appropriate payment and invoicing method with the supplier and come to an agreement. See pg 10 and 11.

After all options have been explored, please invite the supplier through [PaymentWorks Invitation](#).

## Adding A New Supplier

At Rutgers, we have tens of thousands of suppliers already available for purchasing goods and services in a wide range of commodity categories. To support discretionary spending, sourcing strategies, and tail spend control, please evaluate the necessary, appropriate, and reasonable discretionary spending framework before inviting a new supplier.

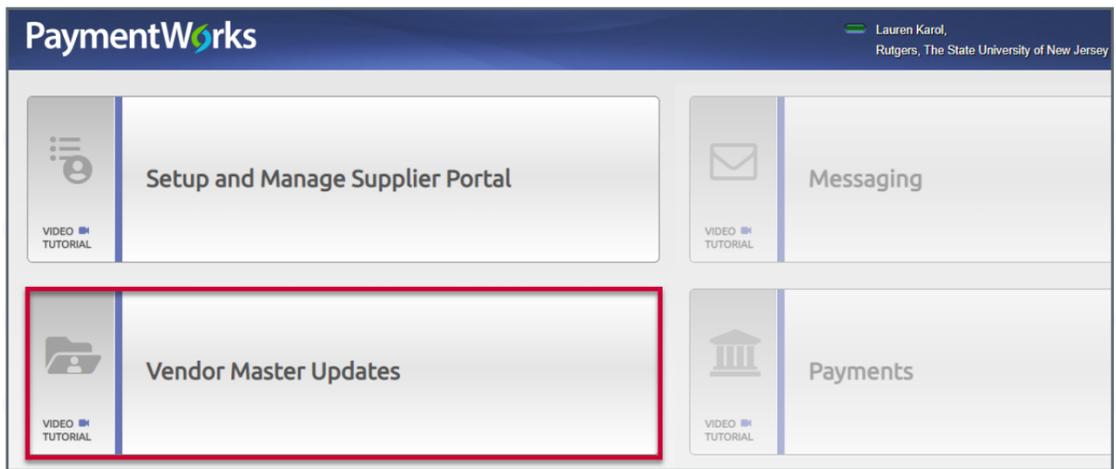
Evaluate whether it is necessary, appropriate, and reasonable to invite a new supplier based on the following:

- Can you make the purchase from the [Punchout catalogs](#)?

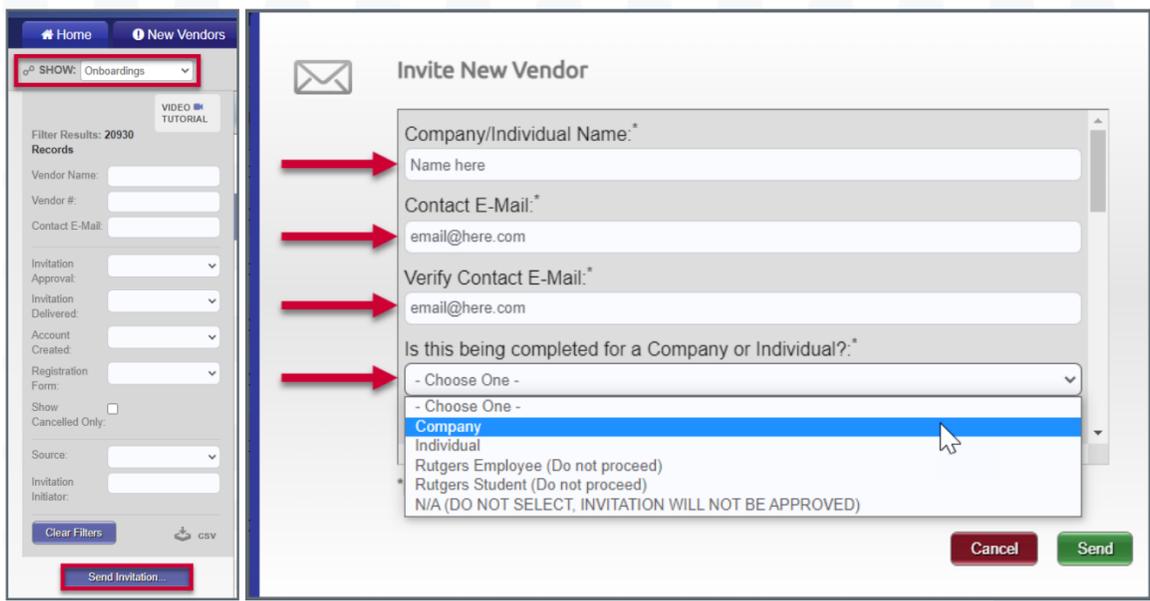
If the invitee does not fall under one of the categories, proceed to the next steps.

# Inviting a New Supplier Through PaymentWorks

- Once on the platform, click **Vendor Master Updates**.



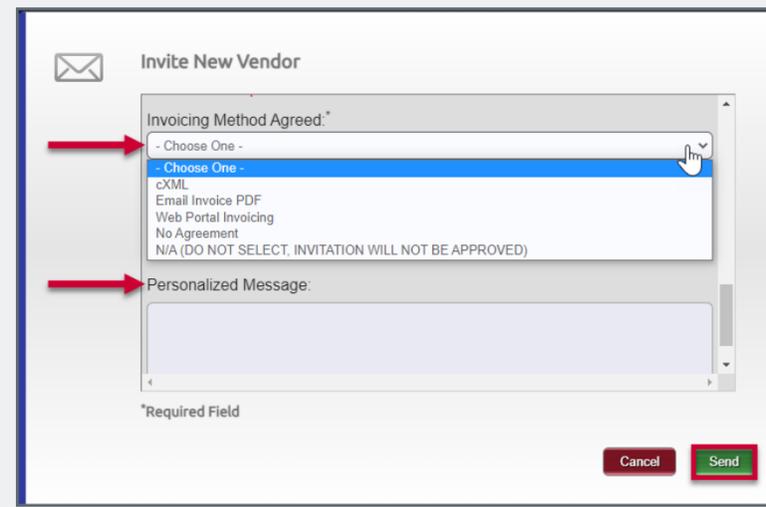
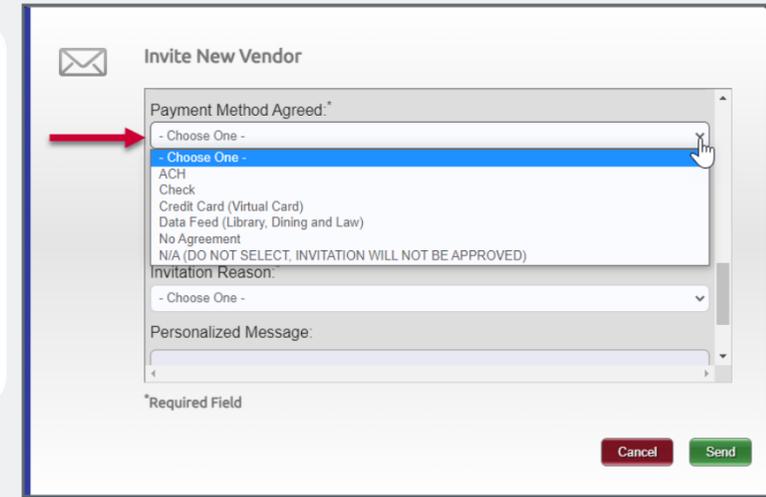
- Make sure the drop down is set to **'Onboarding'** and click **'Send Invitation'**. All the fields with asterisks are required or the invite will fail. **DO NOT CHOOSE N/A.**



**Microsoft has blocked Purchase Orders issued to specific email domains. To ensure the timely distribution of POs, please verify that your email does not include the following domains: Msn, Outlook, Hotmail, Live**

- Choose the **goods/service** that best describes what the supplier is providing. Continue to answer all the drop downs. If you are unsure about the **Estimated Spend** amount, speak with your Supervisor or Business Manager.

- When choosing a **Payment Method Agreement** and **Invoicing Method Agreement**, make sure to check with the supplier **PRIOR** to sending the invitation. See pg 10 and 11.



- Finally add a **Personalized Message** to your supplier, and once all fields are complete, hit **Send**. Your invitation is now sent to the Invitation Approver Bot in Procurement. **Please make the supplier is aware the invite may go to their spam folder.**

# Inviting a New Supplier Through PaymentWorks



Once the Invite is approved, PaymentWorks will send out the invite to the supplier. This is the full form they will need to fill out for your reference.

- **Rutgers University is not utilizing the Invoicing function in Paymentworks.**
- **We do not keep banking information on file and will not use any banking information from a PaymentWorks profile.**
- **Rutgers will contact new companies and LLCs only for electronic payment set up after PaymentWorks registration.**

Welcome | Tax Information | Addresses | Additional Information

### Tax Information

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

For tax purposes, which best describes you?\*

Individual, Sole Proprietorship, or Single-member LLC

Corporation or other complex business entity

Country of Citizenship\*  
(Country of Incorporation if using EIN)

Select an Option  
United Kingdom

TIN Type\*  
Select an Option  
Foreign Tax ID

Legal First Name\*  
Enter Text Here  
demo

Legal Last Name\*  
Enter Text Here  
test

Tax Number\*  
8 to 20 characters  
Enter Text Here  
xxxxxxxxxx

Confirm Tax Number\*  
Enter Text Here  
xxxxxxxxxx

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](#)  
  
W8ben (individual).pdf

Welcome | Tax Information | Addresses | Additional Information

### Primary Address

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

Country\*  
Select an Option  
United Kingdom

Street 1\*  
Enter Text Here  
Palace of Westminster City of Westminster,

Street 2  
Enter Text Here

City\*  
Enter Text Here  
london

State / Province / Region\*  
Select an Option  
Birmingham

Zip / Postal Code\*  
Enter Text Here  
08057-2921

Same as Primary Address

### Remittance Address

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

Country\*  
Select an Option  
United States

Street 1\*  
Enter Text Here

Street 2  
Enter Text Here

City\*  
Enter Text Here

State\*  
Select an Option

Zip / Postal Code\*  
Enter Text Here

**Foreign suppliers should select Foreign tax ID instead of ITIN in the TIN Type section of their PW registration.**

**If they don't have a foreign tax ID, they can reach out to [PW Support](#) for a temporary place holder to input into their PW registration.**

### 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  
test demo

Telephone Number\*  
Enter Telephone Here  
023 1234 1345 ext.

Preferred Email\*  
Enter Email Here  
rupspwtest+demo@gmail.com

Website  
Enter Value Here

Description of Goods or Services  
Enter Text Here  
test

Welcome | Tax Information | Addresses | Additional Information

### Additional Information

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

Rutgers University has partnered with Western Union (Covera) to process wire transfers from international suppliers (non-US and non-Canada) who submit invoices in U.S. dollars (USD).  
There is no fee to set up a wire transfer with Rutgers.  
Please check with your financial institution about incoming wire processing fees. Rutgers will not be responsible for any fees. You will be contacted with instructions for setting your profile with Western Union (Covera).

Invoice Currency\*  
Select an Option  
US Currency

Please click the following link to learn about the Rutgers supplier naming convention. Your name/business name must be formatted accordingly or registration will not be approved.  
<https://procurementservices.rutgers.edu/files/paymentworks-naming-conventiondocx>

If Rutgers needs to deliver a purchase order to you, please confirm delivery method\*  
Select an Option  
Fax

Fax number for Purchase Orders\*  
Enter Text Here  
111 1111 1111

Supplier Category\*  
Select an Option  
Foreign Individual

Are any of the below statements true? (select all that apply)\*

I am performing services in the US

I am providing a software license

I am being paid royalties

I am being paid as a student/fellow/visitor

None of these apply

Are you a Resident Alien?\*

Select an Option

Remittance Contact First Name  
Enter Text Here

Remittance Contact Last Name  
Enter Text Here

Remittance Contact Job Title  
Enter Text Here

Remittance Contact Email  
Enter Text Here

Remittance Contact Phone Number  
Please include your country code, area code and extension  
Enter Telephone Here ext.

Purchase Order Contact First Name  
Enter Text Here

Purchase Order Contact Last Name  
Enter Text Here

Purchase Order Contact Job Title  
Enter Text Here

Purchase Order Contact Email  
Enter Text Here

Purchase Order Contact Phone Number  
Please include your country code, area code and extension  
Enter Telephone Here ext.