UCI Accounting & Fiscal Services

# UCI VENDOR ONBOARDING GUIDE

**PaymentWorks**

*Revised: June 16, 2025*

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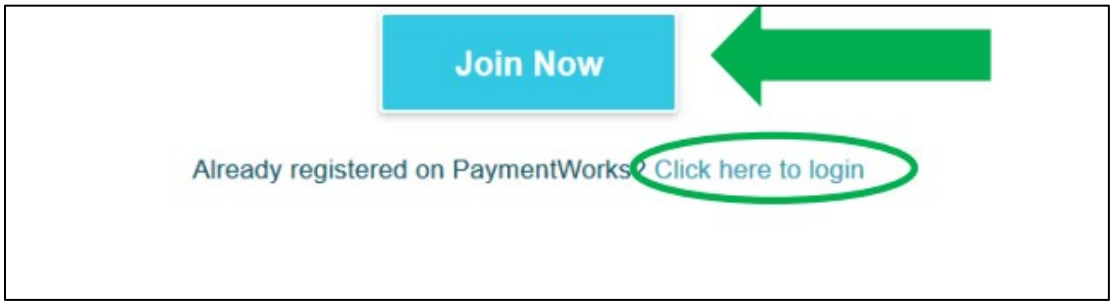
*PaymentWorks is an easy-to-use web portal that allows UC Irvine organizations to invite businesses and individuals to complete an onboarding process and become UC Irvine vendors. This guide was created to help vendors through the registration process and how to make updates to their vendor accounts.*

## Invitation to Register with University of California, Irvine

The first email received by the vendor will be from invitations@paymentworks.com and it will explain the registration process and require the vendor to click on the “Join Now” link to create a new PaymentWorks account. If the vendor already has completed this step to register as a vendor with another institution or business, then they can click on the login link (green circle).

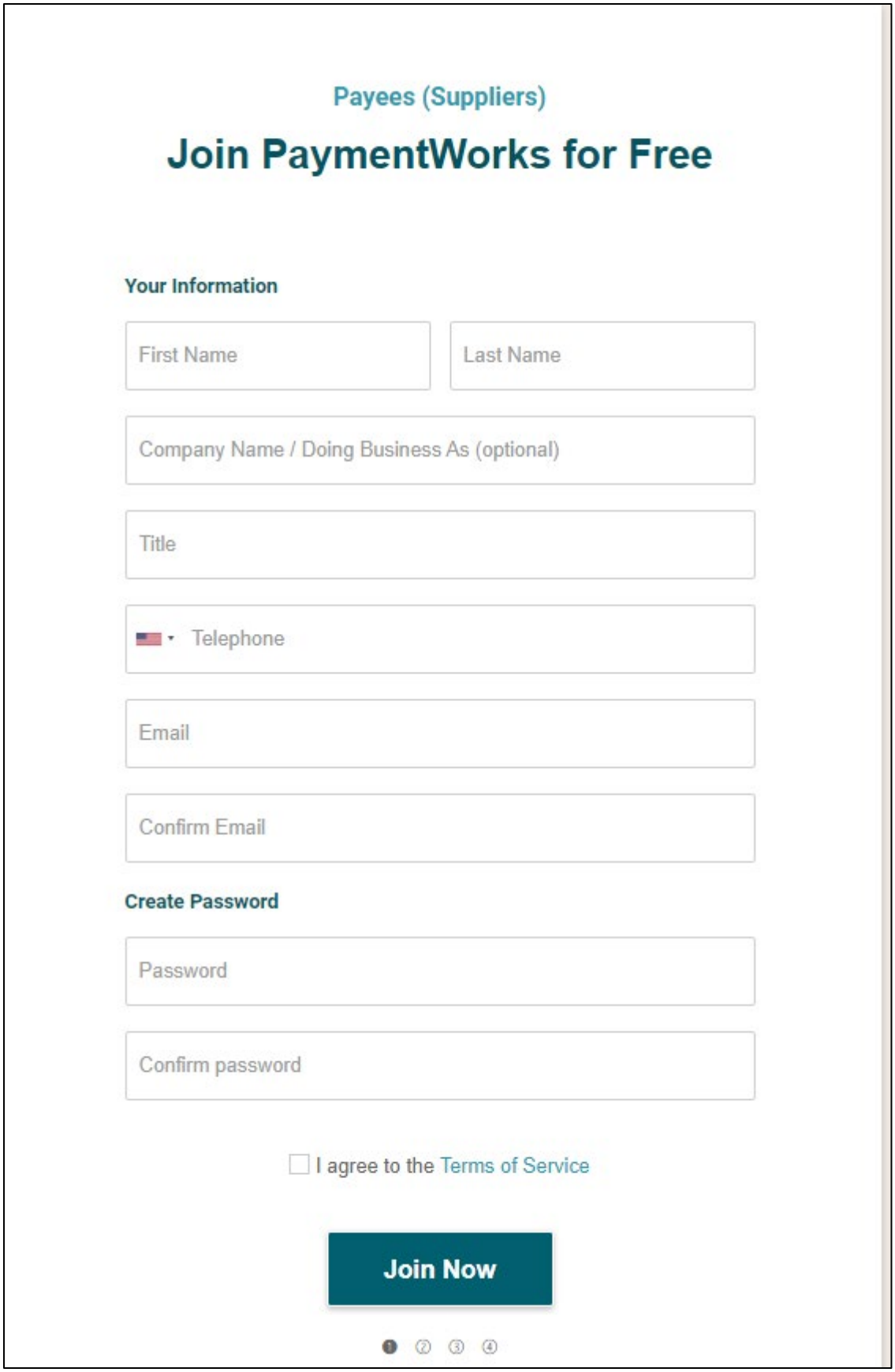



## How to Create a Log-in or Access Current Account

For vendors who have already created an account with another institution or business, they will need to complete the following steps:

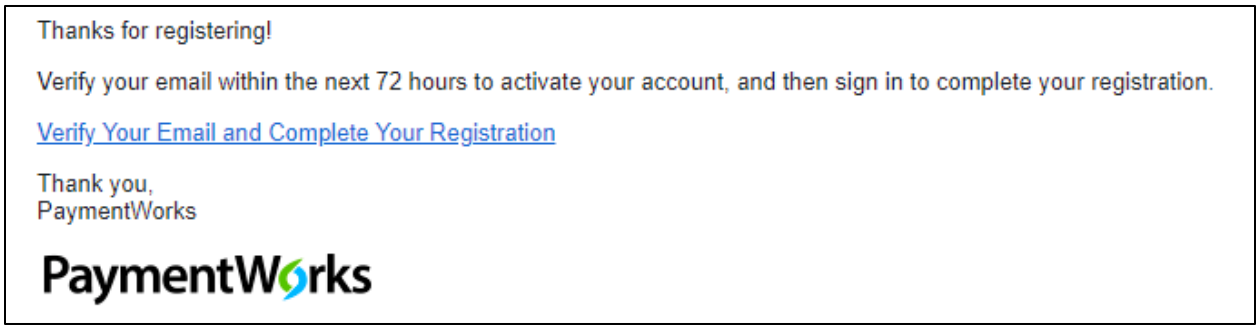
1. Click on the login link provided in the invitation email.
2. Click “Connect” tab in the left corner of the page.
3. Click on the customer's name (University of California, Irvine).
4. The registration form will appear.

For new vendors who are creating an account for the first time, they will need to click on the “Join Now” link, where they will be prompted to create a new log-in.


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

## Accessing Registration Form

Once the log-in has been created and the vendor has registered, the vendor will receive a confirmation email from PaymentWorks as shown below.


Thanks for registering!

Verify your email within the next 72 hours to activate your account, and then sign in to complete your registration.

Verify Your Email and Complete Your Registration

Thank you,
PaymentWorks

PaymentWorks

**Note:** Vendor will need to activate their account within 72 hours of receiving the confirmation email and link. After that time, the link will expire, and vendor should contact vendor-coordinator@uci.edu.

## Existing Vendors – Start Account Registration in PaymentWorks

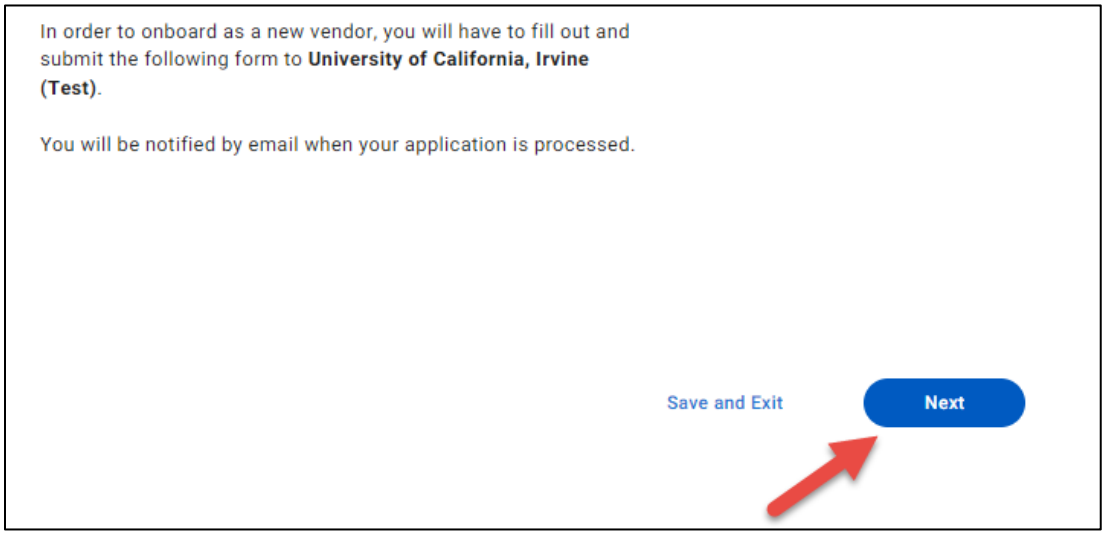
For vendors who have already created an account with another institution or business, they will need to complete the following steps to submit their registration form for UCI:

1. Click on the login link provided in the invitation email.
2. Click “Connect” tab in the left corner of the page.
3. Click on the customer's name (University of California, Irvine).
4. The registration form will appear.
5. Review the information and upload any required files (in PDF, or image format like JPEG or PNG)
6. Ensure that Your Full Name ("Business Name or DBA" field) in the Company Information or Personal Information section of the form says "(Your Remit Name)".
7. Ensure that the name provided on your W-9/W-8 tax form matches exactly with your Remit Name and the name on your Bank Account (for vendors who are setting up an ACH or Wire Transfer account in PaymentWorks).
8. After all information is confirmed on the registration form, click the “Submit” button at the bottom of the form.

## New Vendors – Start the Account Registration in PaymentWorks

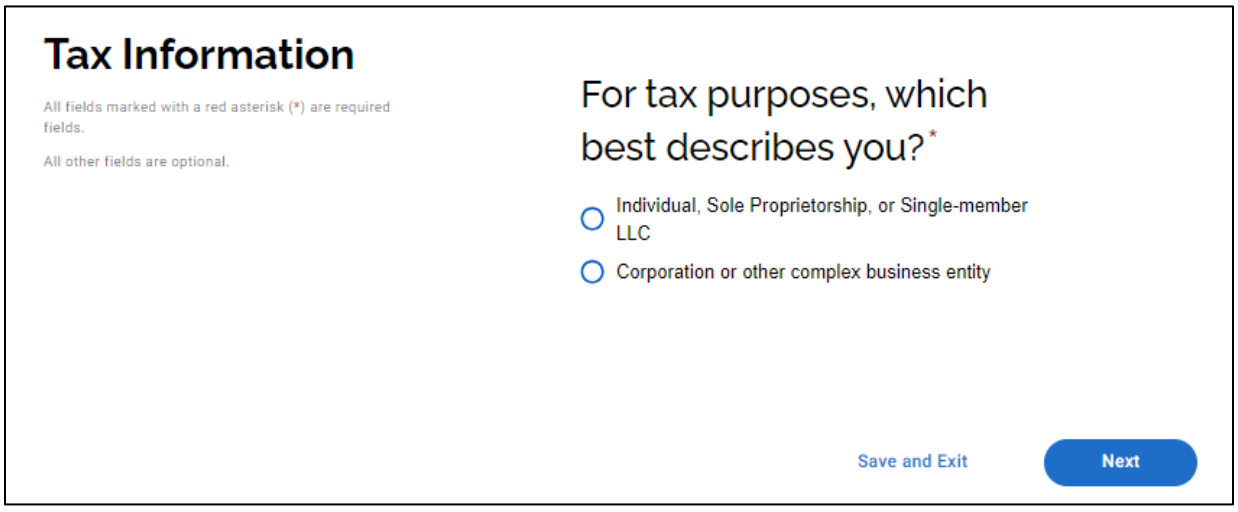
### Step 1: Email Verification

The vendor will then need to click on the link that says, “Verify Your Email and Complete Your Registration”, it will direct vendor to the PaymentWorks page to begin filling out the registration form with their tax, contact, and address information as prompted (see screenshot below).




### Step 2: Enter Tax Information

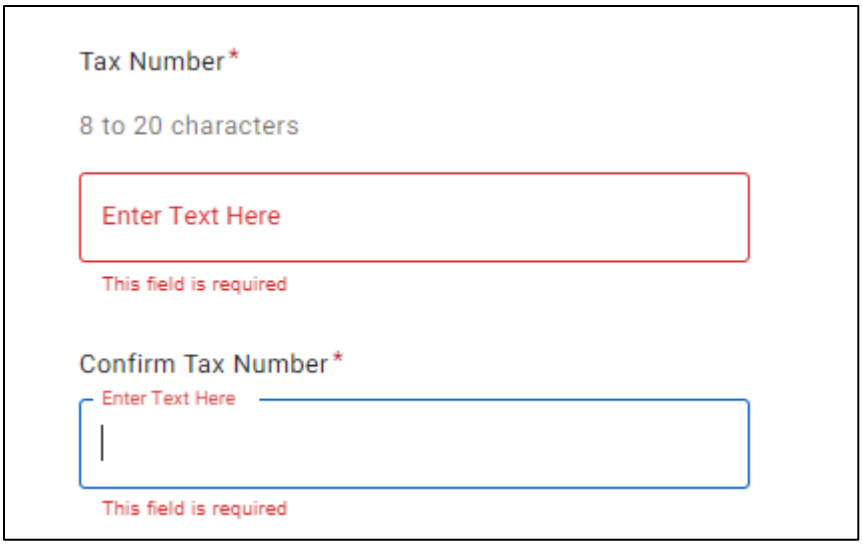
The vendor will need to select the best option to describe its business or organization for tax purposes and complete all the tax related information.




**Note:** W-9/W-8 must be filled out, including the Tax ID number and signature; and Tax ID on the W-8/W-9 form must match the Tax ID provided on the registration form.

**For Foreign Vendors** with citizenship or businesses incorporated outside of the U.S., they will be asked to provide their Foreign Tax ID Number.

If the vendor has not been issued a Foreign Tax ID by their country of origin, and does not have a U.S. Tax ID, such as SSN or ITIN, then the vendor will need to have PaymentWorks issue them a "placeholder" TIN that they can use to fill out the Tax Number section of the registration.



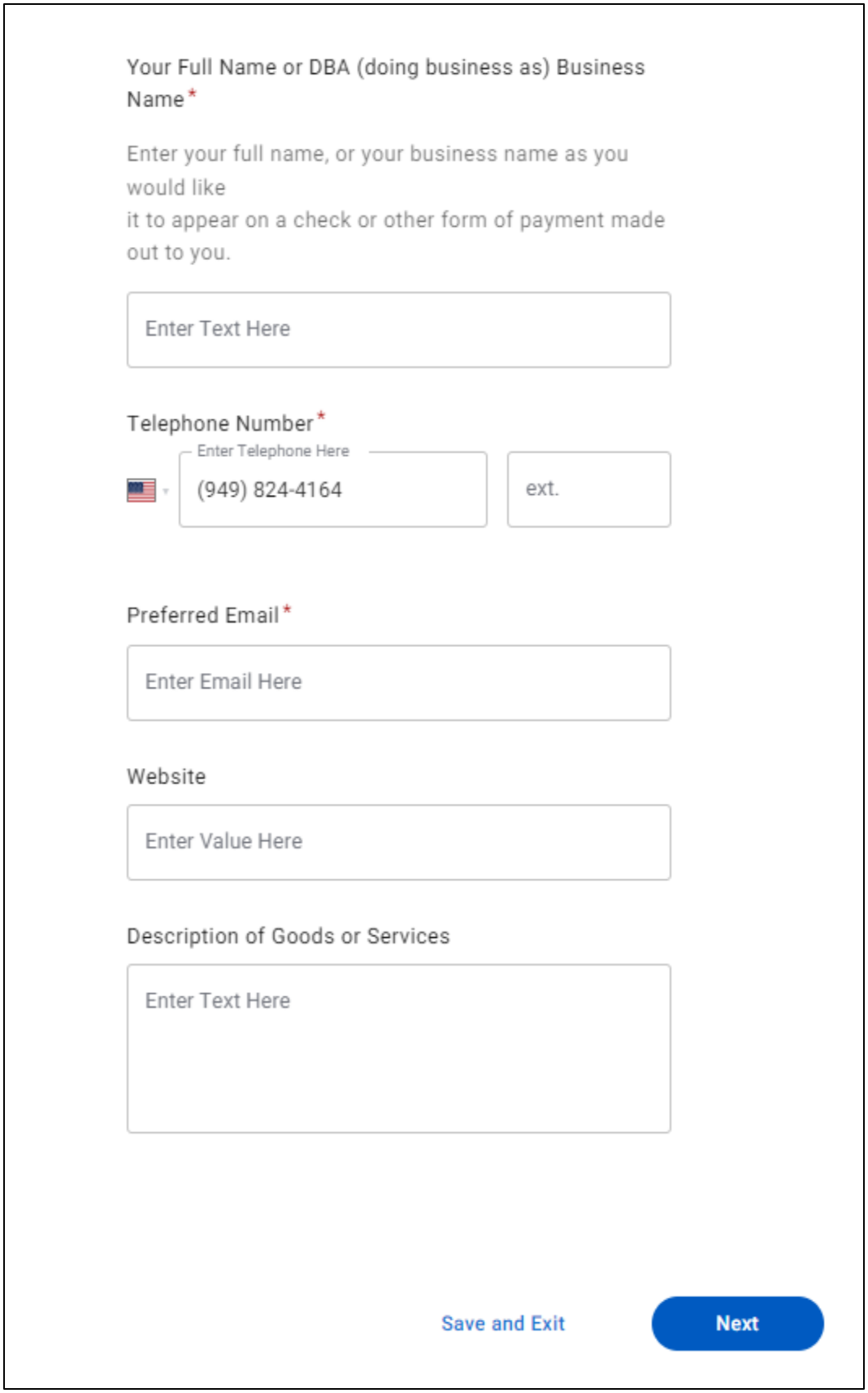

Vendors can contact PaymentWorks Support with this request for a "placeholder" TIN by going to the link here: https://help.paymentworks.com/contactsupport

## Step 3: Enter Vendor Information

Vendor will need to provide the following information:

- Full Name or DBA (Doing Business As) Business Name
- Telephone Number
- Preferred Email
- Website
- Description of Goods and Services

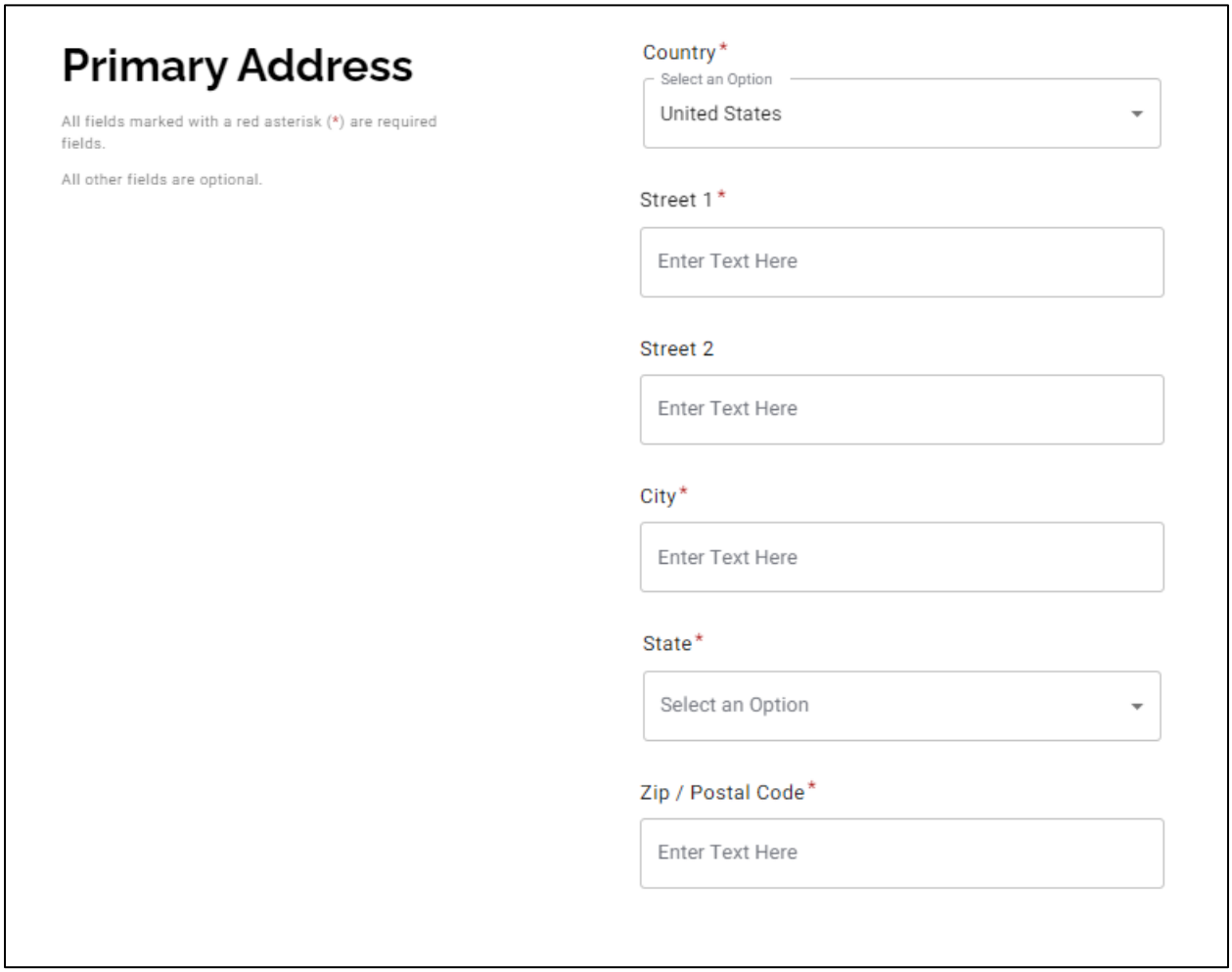
**Note:** When filling out the **"Full Name or DBA Name"**, enter the name that vendor would like it to appear on a check or other form of payment made out to the vendor. This field will populate as the "Pay-To" Name in the Remittance Address section of the registration form. Ensure that the name provided on your W-9/W-8 tax form matches exactly with the "Full Name or DBA Name" and the name on your Bank Account (for vendors who are setting up an ACH or Wire Transfer account in PaymentWorks).


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*
Enter Telephone Here
(949) 824-4164
ext.
Preferred Email*
Enter Email Here
Website
Enter Value Here
Description of Goods or Services
Enter Text Here
Save and Exit
Next

## Step 4: Enter Address Information

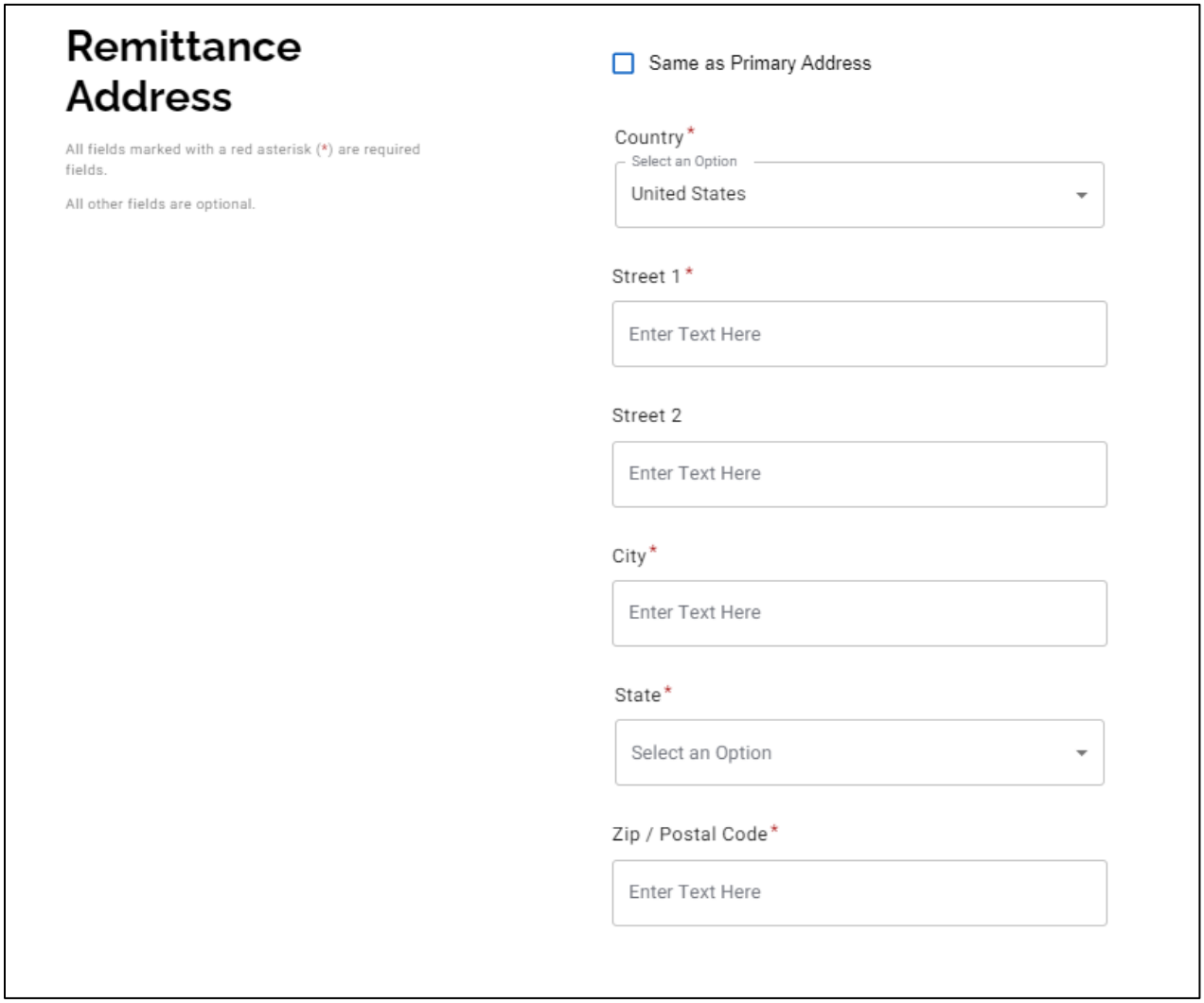
### Legal/Tax Address

Next, the vendor will need to fill out their personal or business address, and remittance address.



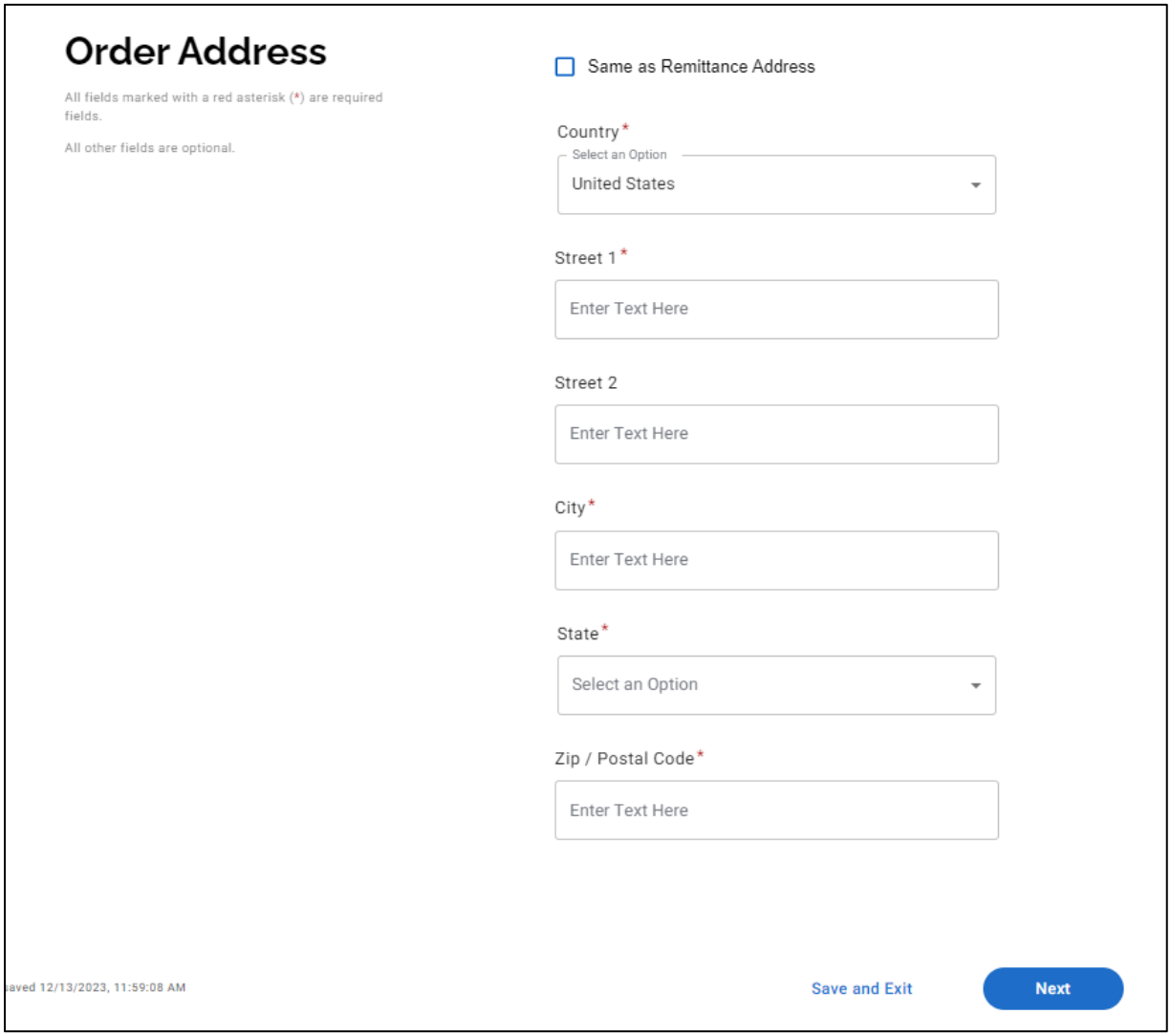
## Remittance Address

Enter a remittance address.



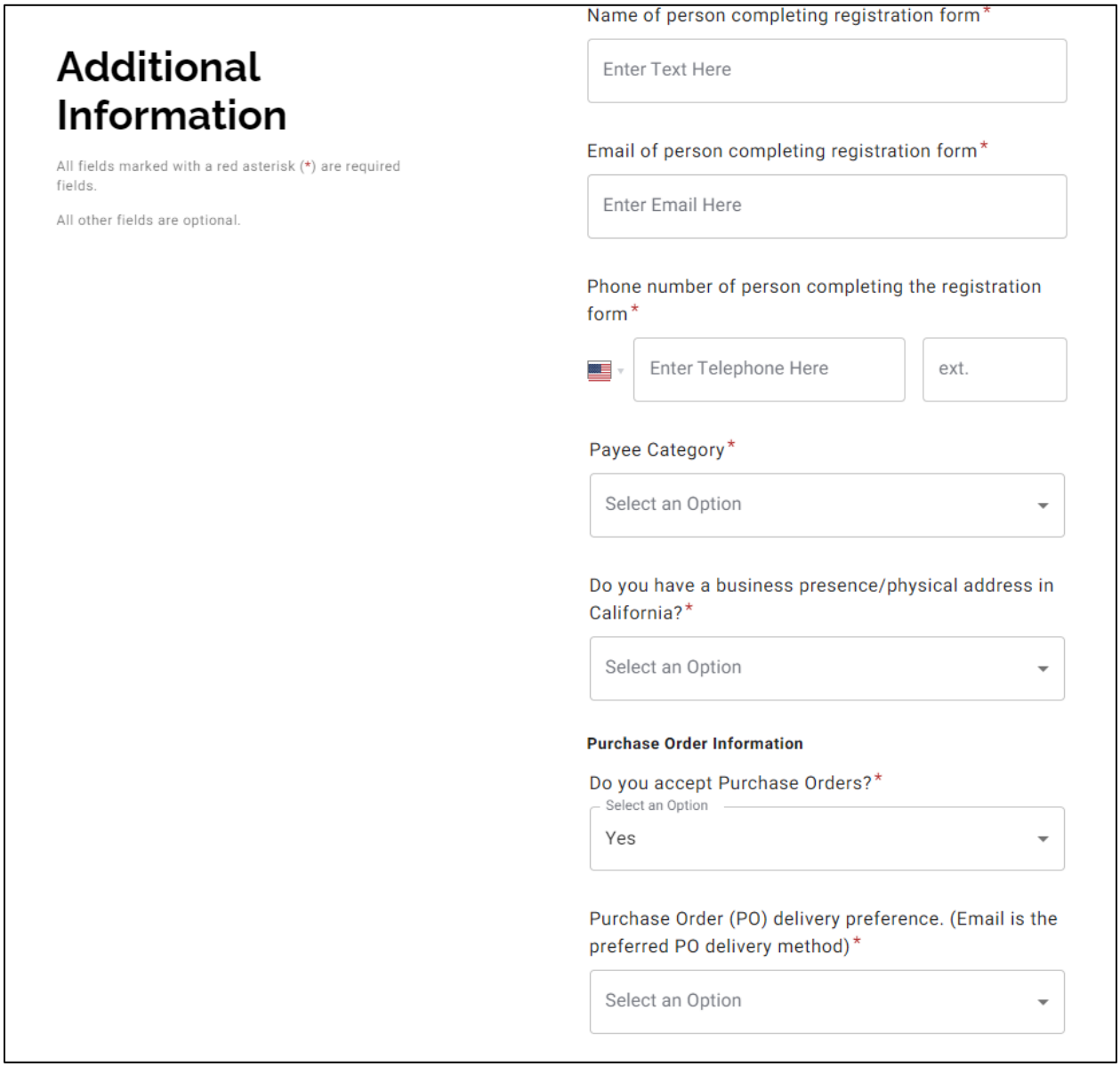
## Purchase Order Address

For PO vendors, they will be prompted to fill out their PO address as well.



## Step 5: Enter Additional Information

Next, the information of the individual who is responsible for completing the registration form will be requested.

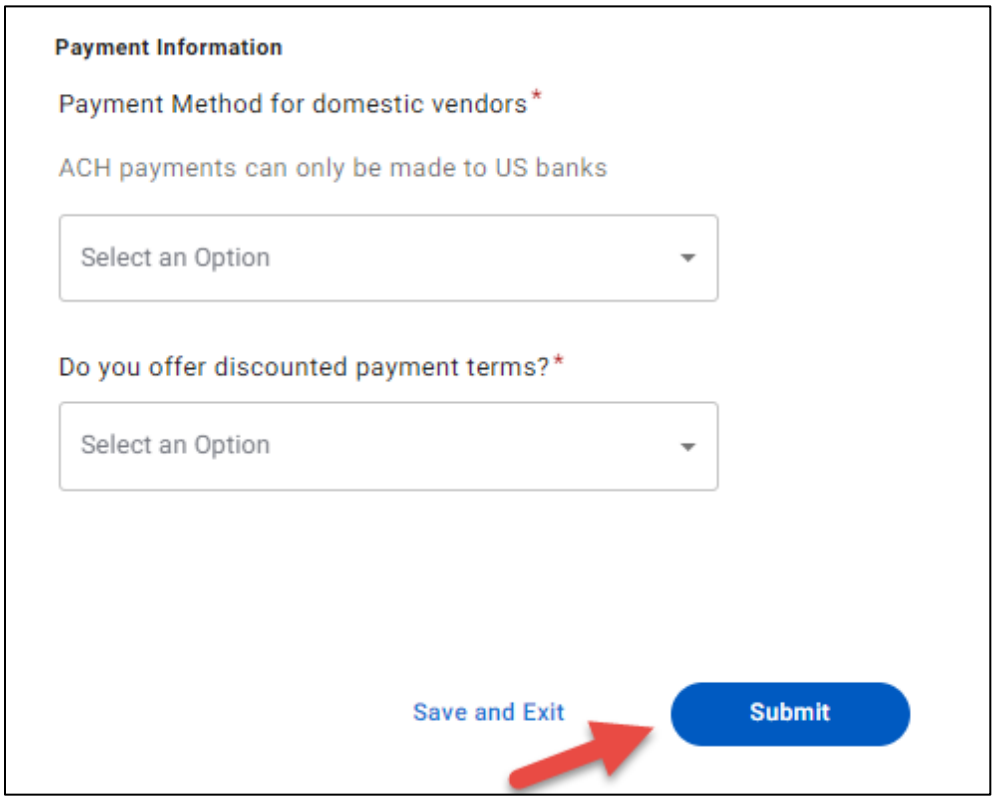


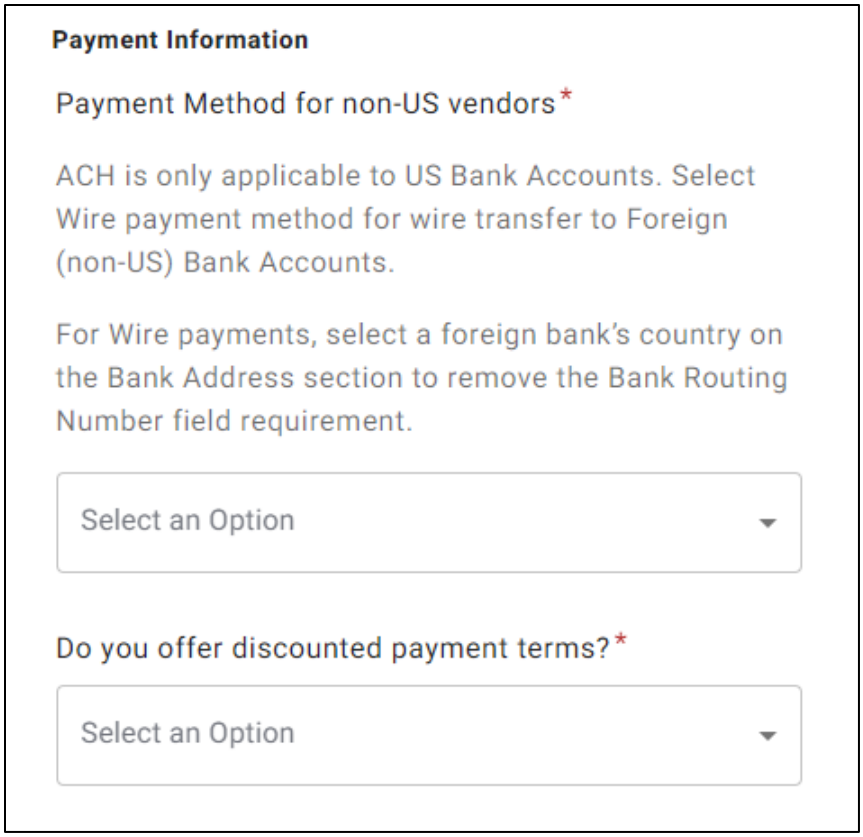

**If you are a 501(c)(3) tax-exempt entity or an out-of-state entity (non-individuals) registered to do business with the State of California**, kindly complete the attached CA Form 590 to reduce the processing time of your payments. Completed forms can be submitted to fsay@uci.edu.

https://www.ftb.ca.gov/forms/2024/2024-590.pdf

## Step 6: Enter Payment Method and Information

Vendors will be required to select a payment method. Foreign vendors with bank accounts outside of the U.S. will NOT be able to select ACH as a payment method option and will need to select wire transfer only.





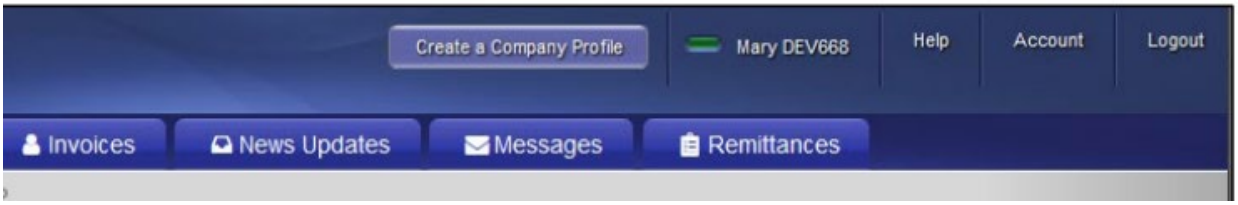

## Step 7: Submit Registration Form

Once the registration has been successfully completed, the vendor will need to click on the "Submit" button to successfully submit the form to UCI for review. Please note, that the "Save and Exit" button will only save the registration form and will NOT be submitted until you click on the "Submit" button.

Once submitted, the UCI Vendor Coordinator will review the vendor's registration form for approval, or it will be returned to the vendor for correction if there are discrepancies or missing information on the vendor's registration form.

## Step 8: Check Message Center for Returned Forms

In the event that a vendor's registration form needs to be returned due to discrepancies or missing information found during the review, the vendor will receive a "Return" message in the "Messages" tab of their account portal, as shown below:




Instructions will be given to the vendor on how to correct their registration form. Once the discrepancies/incomplete information are remedied, vendor will resubmit their registration form by clicking on the “Submit” button at the bottom of the registration page.

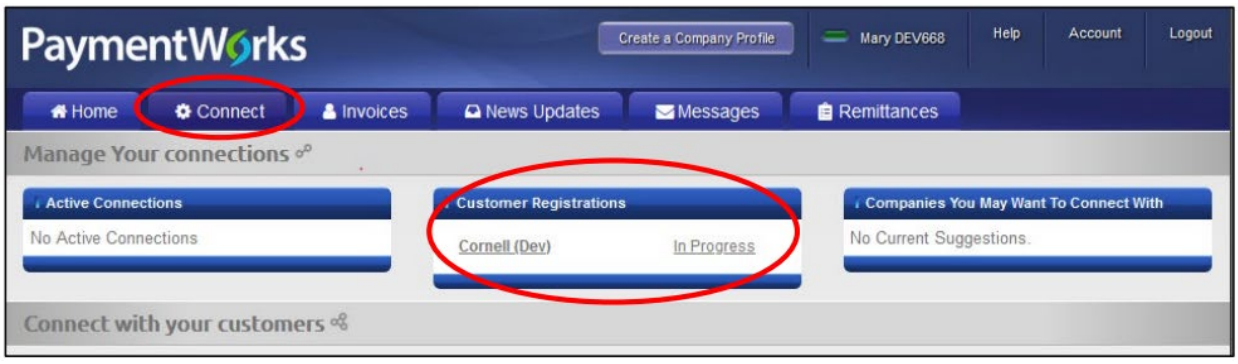
## Step 9: Check Vendor Onboarding Process Status

A confirmation email will be sent to both the vendor and the UCI initiating department once the vendor onboarding process has been successfully completed. At any stage during the registration process, vendors can check status via the Vendor Self-Service Portal.

### Vendor Self-Service Portal

Once vendors have created their log-in for their account, they will be able to check for updates to their registration forms, as well as any other updates regarding their account, in their own PaymentWorks account portal. Vendors can do this by logging into their account and using the tabs on the first page of their portal to access information about their account.

In order for a vendor to check their registration status, they can click on the “Connect” tab and under the “Customer Registrations” section, they will see their status next to the university name, shown in the example below:



If a vendor's registration has been returned to them, then the status will show "Returned". If the vendor has not yet submitted their forms and they are still completing their registration, then the "In Progress" indicator will show.

## How to Make an Update to a Vendor Account

Once a vendor has been successfully onboarded into PaymentWorks, the PaymentWorks portal becomes a fully self-service portal that the vendors can use to make changes to their address, contact, business/individual, and payment information.

> **Important!** If a PaymentWorks vendor needs to make changes to their account, please do not request for another invitation to register, as the invitation process is only for vendors who are onboarding with UCI for the first time in PaymentWorks.

For a vendor guide on how to make changes to their account, vendors can use the link provided here with instructions: https://help.paymentworks.com/knowledge-base/updating-payee-profile-information

## Contacts for Support and Helpdesk

| | |
|---|---|
| **UCI Vendor Coordinator** | vendor-coordinator@uci.edu |
| **UCI Accounts Payable** | accounts-payable@uci.edu |
| **PaymentWorks Support** | https://help.paymentworks.com/contactsupport |