



PaymentWorks Supplier Onboarding Solution

New Process Drivers

- Risk concerns
 - Fraud
- Uniform guidance (Grants)
 - Supplier / Vendor selection requirements
- Internal control requirements and audit requirements
- Current paper-driven process is very inefficient (700 to 1000 / month manual entry)

What Is PaymentWorks?

- PaymentWorks is a cloud-based onboarding application for automating the vendor registration process
- Departmental users are empowered to extend invitations to vendors to register, have visibility into onboarding process
- Vendors will register and maintain their own information through an assigned self-service account
- Currently utilized at a number of higher education institutions including Johns Hopkins, UC Davis, UConn, Cornell, etc.

Empowerment For Departments

- Departments are empowered to create and send their own invitations to vendors to become registered
- Departmental users have quick and easy access to PaymentWorks through the myUK environment
- Departments can see full process and status as vendors are onboarded, receive vendor numbers in your dashboard when assigned

Self-Service For Vendors

- Vendors complete and are responsible for their information. Accuracy for registration information falls to the vendor.
- They can also request their preferred payment type and in some cases, enter/manage their own ACH and other banking data
- Vendors can do their own updates such as address, company merger or acquisition, diversity status, etc. reducing entries on part of University staff

Who Will Register For A Vendor Number?

Any new business, organization, or individual who previously would complete a paper vendor application will use PaymentWorks. This includes any entity for whom a Shopping Cart / Requisition or PRD would be initiated (except employee reimbursements):

- US Business or Individuals
- Foreign Business or Individuals
- Non-Profits or Government Entities
- Student Organizations
- Foreign Persons Utilizing W8-BEN Forms
- UK Imprest (Petty Cash) Custodians

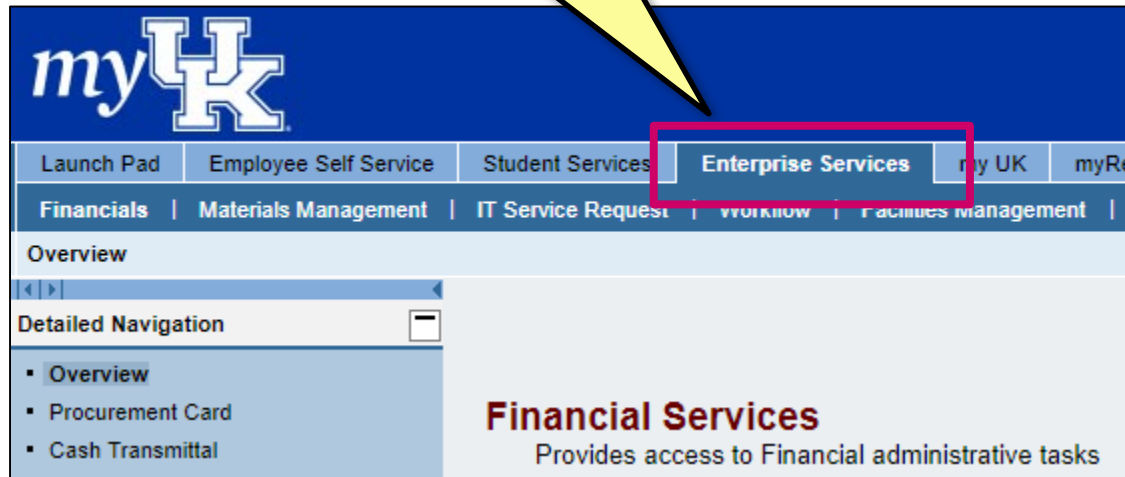
Current University Database File

- Existing active vendors will continue to be available for Shopping Carts/Requisitions, PRDs, etc.
- Continue to first search for an existing vendor as normal in Shopping Carts/Requisitions, PRD, or SAP T-Code XK-03
- Only use PaymentWorks to onboard a new vendor who is not currently in the University's system.
- At a later date, the UK vendor database will be integrated with PaymentWorks providing active searches for all vendors

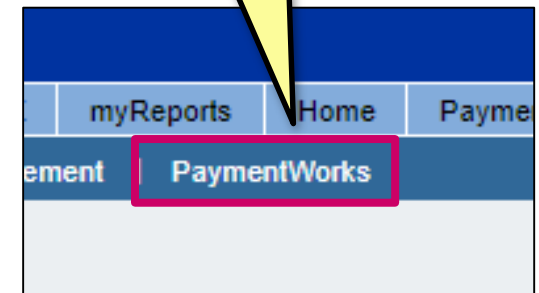
PaymentWorks Tour

- To request a vendor be added to the University vendor database, start in myUK – Enterprise Services tab

1. Navigate to Enterprise Services tab

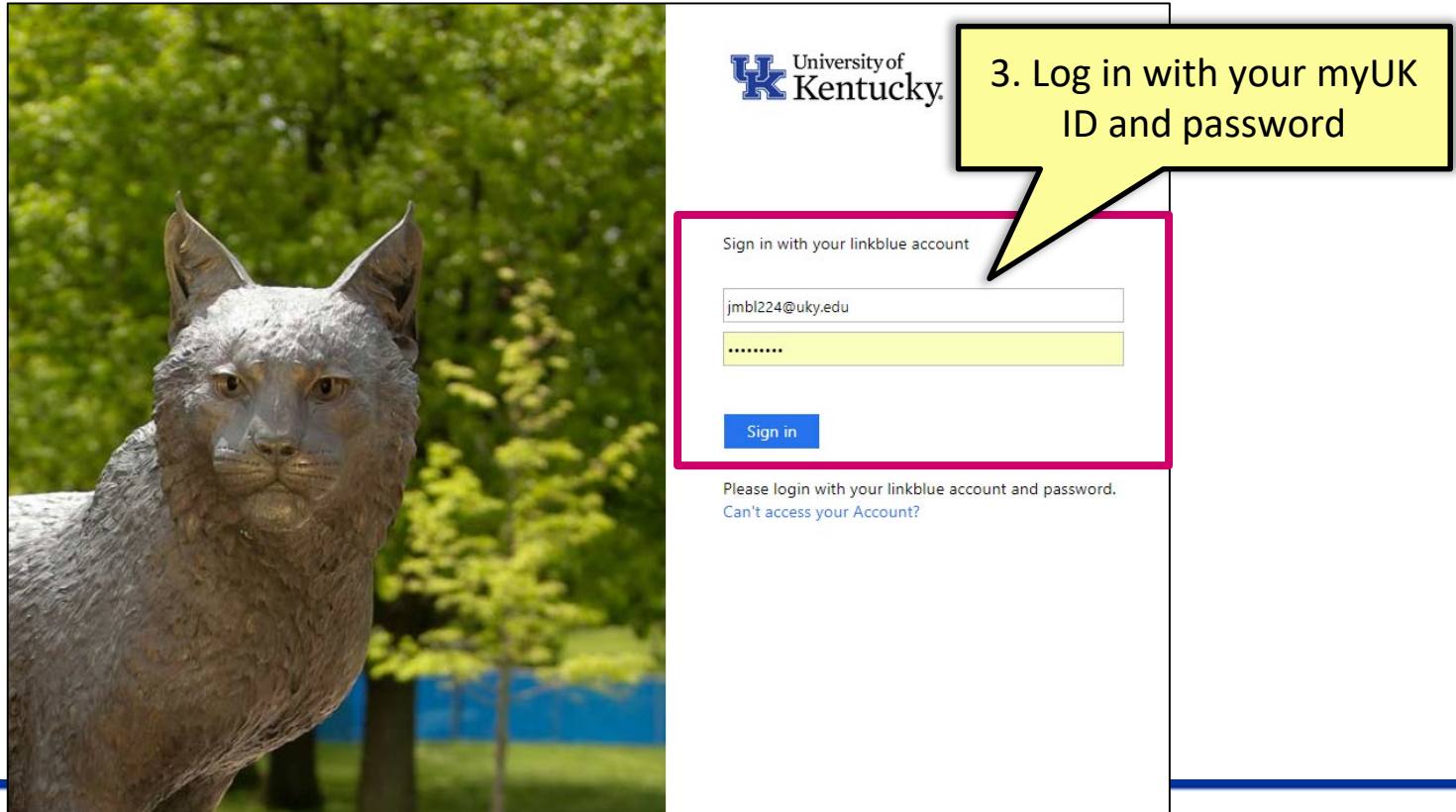


2. Click PaymentWorks



Login To PaymentWorks

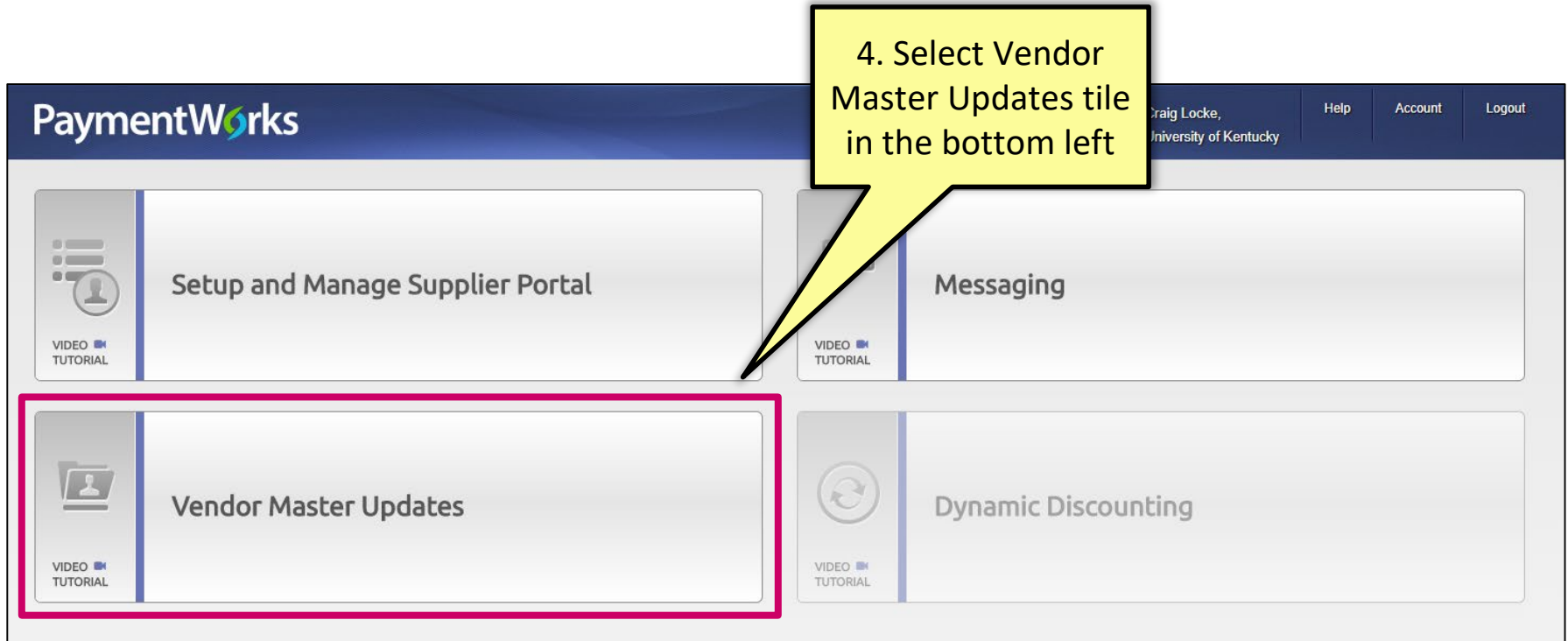
Login via the Single Sign-On (SSO) screen with your UK ID and password (the same as you do for any UK application)



The screenshot shows the University of Kentucky login interface. On the left is a large image of the Wildcat statue. On the right, the University of Kentucky logo is at the top. Below it, the text "Sign in with your linkblue account" is followed by two input fields: one for the email address "jmb1224@uky.edu" and one for the password, which is masked with dots. A blue "Sign in" button is positioned below the password field. A yellow callout box with a black border points to the login fields and contains the text "3. Log in with your myUK ID and password". Below the login form, there is a message: "Please login with your linkblue account and password. [Can't access your Account?](#)".

Arrive At PaymentWorks

The UK user will arrive at the PaymentWorks home screen and select Vendor Master Updates tile



PaymentWorks Dashboard

Each UK user has a PaymentWorks dashboard unique to their vendor requests

Dashboard shows all requests specific to your vendor invitations. Records shows date, vendor name, status and onboarding progress.

The screenshot shows the PaymentWorks dashboard interface. At the top, there is a navigation bar with 'Home', 'Updates', and 'New Vendors' buttons. Below this is a 'SHOW: Onboardings' dropdown. The main content area features a table with the following columns: ONBOARD START, UPDATED, VENDOR NAME, INVITATION, VENDOR ACCOUNT, and % COMPLETE. The table contains six rows of data, each representing a different vendor's onboarding progress. A 'Filter Results' sidebar on the left includes search fields for Vendor Name, Vendor #, and Contact E-Mail, as well as dropdown menus for Invitation Approval, Invitation Delivered, Account Created, Registration Form, and Source. A 'Clear Filters' button is located at the bottom of the sidebar. A 'Send Invitation...' button is positioned at the bottom center of the dashboard.

ONBOARD START	UPDATED	VENDOR NAME	INVITATION	VENDOR ACCOUNT	% COMPLETE
07/18/2018	07/19/2018	Smith and Webster Professional Services	Clicked	Email Validated	Submitted
07/18/2018	07/19/2018	Huntington Specialized Robotics	Clicked	Email Validated	Submitted
07/18/2018	07/19/2018	Nielson Company	Clicked	Email Validated	Not Started
07/18/2018	07/19/2018	Albertson Cleaning Company	Clicked	Email Validated	Not Started
07/18/2018	07/18/2018	Gaylord Library Supplies Inc	Delivered	No Account	Not Started
07/18/2018	07/18/2018	Henry Schein Dental	Delivered	No Account	Not Started

Send Invitation

The UK user sends an invitation directly to a vendor via email

5. Click Send Invitation button

PaymentWorks Vendor Master Updates

Home Updates New Vendors

SHOW: Onboardings

VIDEO TUTORIAL

Filter Results:

Vendor Name:

Vendor #:

Contact E-Mail:

Invitation Approval:

Invitation Delivered:

Account Created:

Registration Form:

Source:

Invitation Initiator:

Clear Filters

ONBOARD START	UPDATED	VENDOR NAME
07/18/2018	07/19/2018	Smith and Webster Professional Services
07/18/2018	07/19/2018	Huntington Specialized Robotics
07/18/2018	07/19/2018	Nielson Company
07/18/2018	07/19/2018	Albertson Cleaning Company
07/18/2018	07/18/2018	Gaylord Library Supplies Inc
07/18/2018	07/18/2018	Henry Schein Dental

Send Invitation...

Complete The Invitation

Complete the invitation to the vendor to become registered

6. Complete the invitation with their name, email, and message. Click Send.

Sending the invitation is the only step performed by the UK user

Invite New Vendor

Company/Individual Name:*
Jackson Engineering Supplies

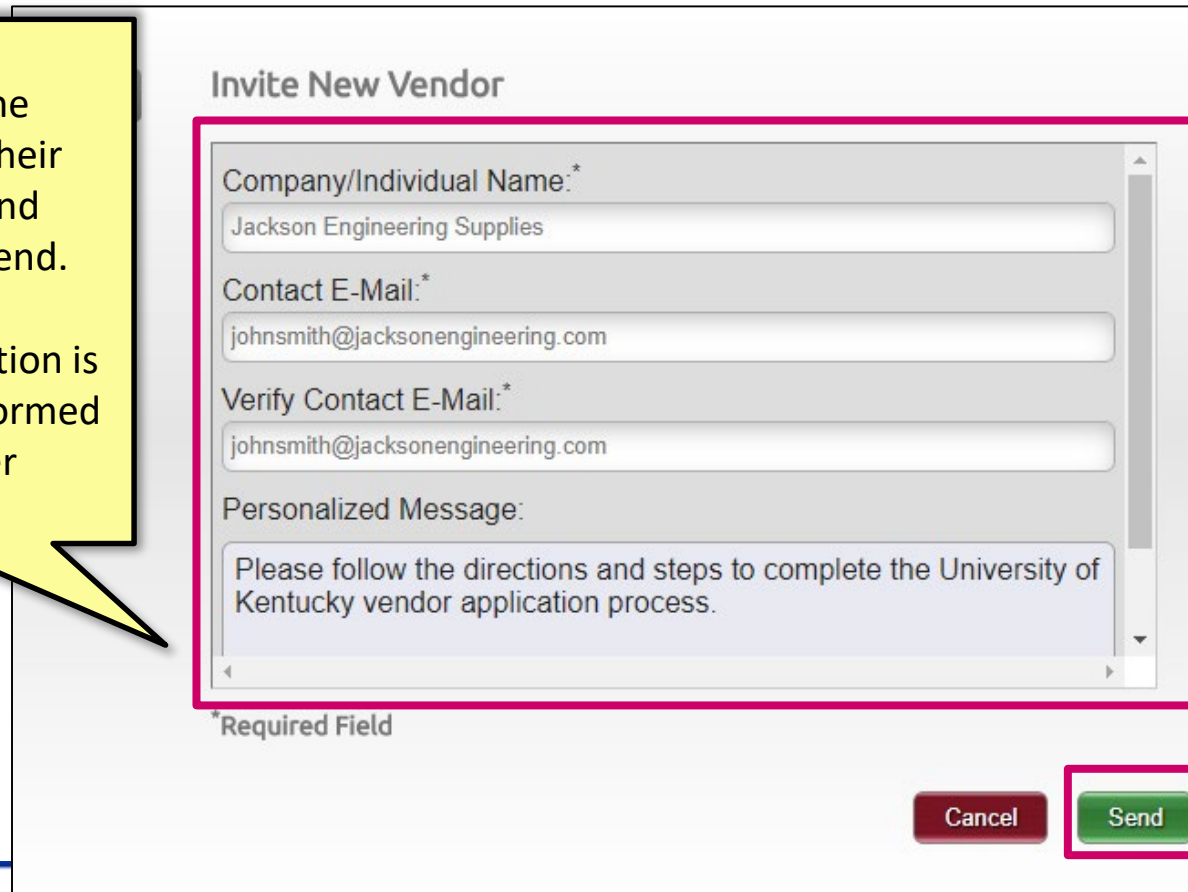
Contact E-Mail:*
johnsmith@jacksonengineering.com

Verify Contact E-Mail:*
johnsmith@jacksonengineering.com

Personalized Message:
Please follow the directions and steps to complete the University of Kentucky vendor application process.

*Required Field

Cancel Send



Vendor Receives Email Invitation

The vendor will receive the email invitation with a link to begin the registration process

The Vendor begins registration via their invitation email link

PaymentWorks

Dear Jackson Engineering Supplies:

In order for Kentucky Development to establish you or your company as a payee or vendor, please [click here](#) to register on PaymentWorks, Kentucky Development's supplier portal.

Craig Locke has invited you to register as a new vendor to Kentucky Development.

Please follow the directions and steps to complete the University of Kentucky vendor application process.

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 any questions, please do not hesitate to reach out to support@paymentworks.com.

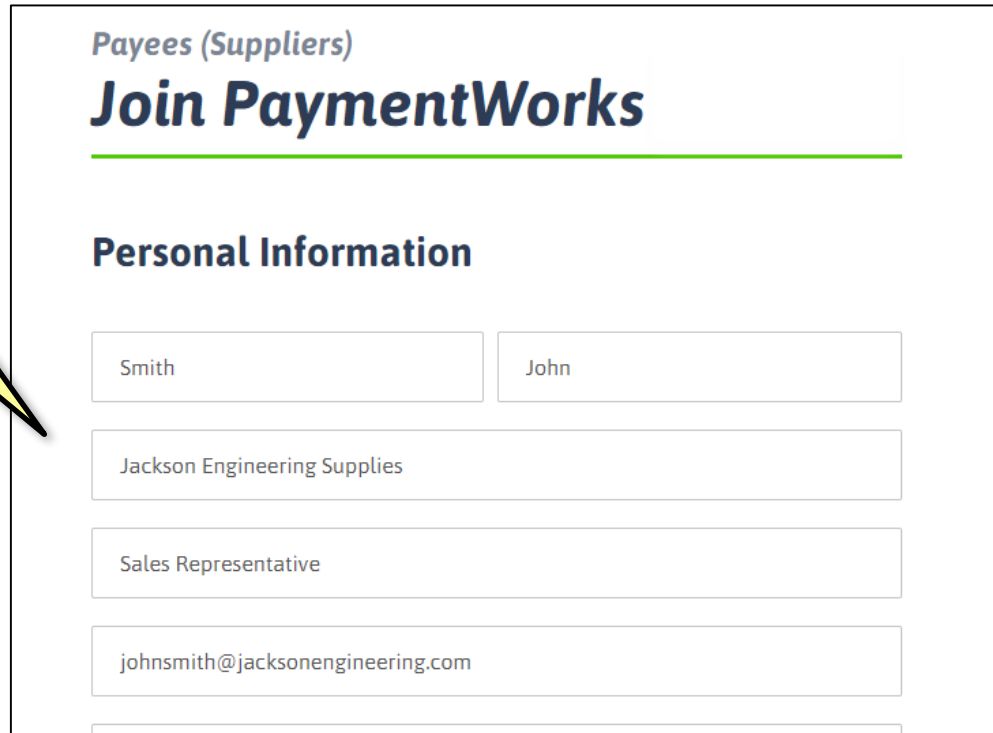
Thank you for your support.

Vendor Creates Account

Vendor will create an account through the link and follow the steps to register. There is no charge to the vendor to register.



Vendor creates an account



Payees (Suppliers)
Join PaymentWorks

Personal Information

Smith	John
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Jackson Engineering Supplies

Sales Representative

johnsmith@jacksonengineering.com

Vendor Completes Registration Process

Vendor completes the online application process. The form is customized for all University vendor types.

Please fill out and submit the following form. The information you provide will be submitted to Kentucky Development and you will be notified by email when your application is processed. Once you are approved as a new vendor of Kentucky Development, you will immediately be able to see the status of all invoices you have submitted to Kentucky Development.

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

Business Details

For tax purposes are you an individual, sole proprietor or single-member LLC? Yes No

Country of Incorporation or Organization* United States of America

Business Legal Name:* Jackson Engineering Supplies
For tax purposes

EIN:*
9-digit number, no spaces or dashes

Confirm EIN:*
9-digit number, no spaces or dashes

Tax Classification:* C Corporation
This can be found under section 3 of your W-9

Generate Electronic W-9:

When you use PaymentWorks, we will create an IRS form W-9 for you automatically, unless you opt out. Electronic W-9s are convenient for you and provide enhanced security for your customers. You may wish to opt-out of electronic W-9 generation if you have any exemptions (Section 4) or specific signature requirements (see instructions on page 4 and 5 of the W-9).

Vendor completes the required form entries



Vendor Completes Registration Process

Vendor Type: *

Please specify your incorporation and citizenship status

US Entity ▼

- Choose One -
- US Citizen
- Non-US Citizen
- US Entity
- Non-US Entity

Are you registering on behalf of a UK Student Organization?: *

No ▼

Are you registering on behalf of a medical product, hospital product or service supplier?: *

No ▼

As the vendor completes the registration, they select entries unique to them. The menu choices and dropdowns are customized depending on the vendor type.

Vendor Completes Registration Process

Depending on the vendor type, the PaymentWorks “Smart Form” will only require entries unique to them.

Standard vendors will fill in information on their business and desired payment type

Student Orgs, UK Imprest Custodians will only complete a limited number of menu-driven fields unique to their needs.

Diversity Classification:

Please select if any of the follow diversity classifications apply to your business

- Small Business Veteran Owned Business
 Woman Owned Business Minority Owned Business

Woman Owned Business Diversity Certification: *

Please upload your diversity certification as a PDF upload.

Diversity Certification.pdf

Does your company accept Visa?: *

No ▾

Payment Method: *

Pay by Check ▾

UK User Dashboard

The departmental user's dashboard shows all their vendor invitations with status updates

The screenshot shows the PaymentWorks 'Vendor Master Updates' dashboard. It features a navigation bar with 'Home', 'Updates', and 'New Vendors' tabs. A 'SHOW: Onboardings' dropdown is visible. On the left, there are filter fields for Vendor Name, Vendor #, Contact E-Mail, Invitation Approval, Invitation Delivered, Account Created, Registration Form, Source, and Invitation Initiator. A 'Clear Filters' button is located below these filters. The main area contains a table with the following columns: ONBOARD START, UPDATED, VENDOR NAME, INVITATION, VENDOR ACCOUNT, and NEW VENDOR REG. The table lists several vendors with their respective onboarding statuses and progress bars.

ONBOARD START	UPDATED	VENDOR NAME	INVITATION	VENDOR ACCOUNT	NEW VENDOR REG.
07/19/2018	07/19/2018	Jackson Engineering Supplies	Clicked	Email Validated	In Progress
07/18/2018	07/19/2018	Smith and Webster Professional Services	Clicked	Email Validated	Submitted
07/18/2018	07/19/2018	Huntington Specialized Robotics	Clicked	Email Validated	Submitted
07/18/2018	07/19/2018	Nielson Company	Clicked	Email Validated	Not Started
07/18/2018	07/19/2018	Albertson Cleaning Company	Clicked	Email Validated	Not Started
07/18/2018	07/18/2018	Gaylord Library Supplies Inc	Delivered	No Account	Not Started
07/18/2018	07/18/2018	Henry Schein Dental	Delivered	No Account	Not Started

UK user can access their dashboard through myUK Enterprise Services tab anytime for status updates

Vendor Number Assigned Upon Completion

When the vendor is fully onboarded, the University vendor number will appear in the PaymentWorks dashboard line

8. When fully approved and onboarded, the status will reflect **Complete** and the vendor number will appear in your dashboard

ONBOARD START	UPDATED ▾	VENDOR NAME	INVITATION	VENDOR ACCO	NEW VENDOR REGISTRATION	% COMPLETE
06/27/2018	07/05/2018	Bethany's Building Supplies	Clicked	Email Validated	Approved	
06/27/2018	07/05/2018	Bethany's Print Shop	Clicked	Email Validated	Complete Vendor #: 0000375330	

Utilizing Your Dashboard

You can click the links at any time for more information for onboarding status

Clicking any hyperlink will display extended information

ONBOARD START	UPDATED	VENDOR NAME	INVITATION	VENDOR ACCOUNT	NEW VENDOR REGISTRATION	% COMPLETE
07/19/2018	07/19/2018	Jackson Engineering Supplies	Clicked	Email Validated	In Progress	<div style="width: 50%;"><div style="background-color: #4f81bd; height: 10px;"></div></div>
07/18/2018	07/19/2018	Smith and Webster Professional Services	Clicked	Email Validated	Submitted	<div style="width: 75%;"><div style="background-color: #4f81bd; height: 10px;"></div></div>

Account Details: close ✕

<p>User Name: Smith John</p>	<p>User E-mail: lockecraig3+36@gmail.com</p>	<p>Company Name: Jackson Engineering Supplies</p>
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Account created:
07/19/2018

Utilizing Your Dashboard

If you see a vendor has not completed the registration, you can resend the invitation if desired. PaymentWorks also sends reminders to vendors automatically.

If email invitation delivered, but no account created, you can resend invitation

07/18/2018	07/18/2018	Gay Supplies	Delivered	No Account	Not Started	
07/18/2018	07/18/2018	Henry Schein Dental	Delivered	No Account	Not Started	

close ✕

Vendor Name: Henry Schein Dental	Contact E-mail: lockecraig3+34@gmail.com	Initiated: 07/18/2018	Email Sent: 07/18/2018
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Resend Invitation

Current Vendor Application No Longer Used

The current University vendor application will be removed from the Purchasing website and use at PaymentWorks go-live, planned for ~August 14.

Please be sure to delete any local versions you may have saved to your computer.

UK UNIVERSITY OF KENTUCKY
VENDOR DATABASE (SUPP) (ITE W9) ADDITION FORM

The University of Kentucky requires all vendors doing business with the University in order to be eligible for purchase orders. All vendors must provide a tax identification number for all vendors doing business with the University in order to be eligible for purchase orders. See the University's Vendor Requirements page for more information.

Are you a UK employee? Yes No

If you are a UK employee, please provide your employee ID number.

Return to the University of Kentucky Purchasing Department
 FAX: Vendor Support (502) 325-2200
 E-mail: procurement@uky.edu

TO BE COMPLETED BY VENDOR ONLY

Printed Name: _____
 (from below)

Personnel #/Pers-Assgn: _____
 Personnel #: <http://www.uky.edu/Purc>

PHYSICAL ADDRESS:

Name of Vendor _____ Number * _____
 Address _____
 Address _____
 City * _____ State * _____ Zip * _____
 Zip Code _____ Quarters* _____

- Federal Identification Number (1) – This field **must** be completed.
- DUNS 9-digit Data Universal Numbering System (2) – This field **must** be completed. Provide Headquarters if DUNS required.
- Social Security Number (3) – This field **must** be completed. Provide individual's name.

Make Checks Payable To * _____
 Payment Address * _____
 Payment Address * _____ Fax Number * _____
 City * _____ State * _____ Zip * _____ Payment Terms * _____

Business Classification (check all that apply) * **E-mail:** _____

<input type="checkbox"/> (S) Small Business (as defined by Federal Law)	<input type="checkbox"/> (W) Woman Owned Business	<input type="checkbox"/> (N) Minority Owned Business	<input type="checkbox"/> (M) Medical Services Provider	<input type="checkbox"/> (A) Attorney
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UK Employees Seeking Reimbursement

UK Employees seeking an 8XXXXX number for a reimbursement will not use PaymentWorks.

A special form is on the Purchasing website to use their PERNER number for reference

No change from current process

<http://www.uky.edu/Purchasing/>




Hospital Purchasing

ision

Quick Links

- Amazon Tax Exempt
- Approved Caterers
- Credit Report
- Desktop Computer Standards
- **Employee Perner Form**
- Forms
- Procurement Card
- Purchasing AP Quick Reference Guide
- Student Housing Developer
- Tax Exempt Information
- UK PNC Banking Services Agreement
- UK FCU Agreement
- Vendor Database Addition Form for Campus
- Year End Cut-Off Memo

UK Employees Seeking Reimbursement



EMPLOYEES ONLY

UK EMPLOYEE PERNER FORM – [FOR UK EMPLOYEES ONLY](#)

This form should be used by UK employees who need to be added to the university's vendor database for reimbursements, etc. Please provide your name and perner number and forward to the Purchasing office at the address below.

If you are not sure how to find your perner number, there are instructions at this link http://www.uky.edu/Purchasing/docs/qrc_perner.pdf.

Printed Name:

UK Personnel # / Pers-Assgn:

Return form in one of the following ways:

E-mail: jreed@uky.edu

Fax: 859-257-1951

Campus Mail: Purchasing Division
322 Peterson Service Bldg.
ATTN: J. Reed
Campus 0005

Employee PERNER number form on Purchasing website

Summary For UK Internal Parties:

Internal Entity	What To Use?
UK Student or Student Org	PaymentWorks
UK Imprest Cash Custodian	PaymentWorks
UK Employee (Reimbursement)	PERNER form on Purchasing website

Common Frequently Asked Questions

Question 1: What is the main change for me as a departmental employee with regard to PaymentWorks?

Answer: The main change is simply to use the PaymentWorks invitation process to request new vendor entry rather than the paper-based vendor application

Question 2: I do orders or PRDS for students, UK orgs, foreign staff with W8-BEN forms. How will they be affected?

Answer: Send the PaymentWorks invitation to all entities/persons that need a vendor number. The registration form has customized entries for every University vendor type.

Common Frequently Asked Questions

Question 3: Will current SAP/SRM/PRD vendors need invitations sent to them to be reloaded into PaymentWorks?

Answer: No, any active vendor number will remain in the University's data file; only new vendor registrations need invitations sent to them.

Question 4: How will vendor updates be managed?

Answer: A new vendor onboarded through PaymentWorks will have the ability to update their own information. This updates the larger UK vendor database.

Common Frequently Asked Questions

A comprehensive list of FAQs is available on the Purchasing website at:

<http://www.uky.edu/Purchasing/docs/paymentworksfaq.pdf>



University of Kentucky
Purchasing Division
322 Peterson Service Building
Lexington, KY 40506
P: 859-257-9100
F: 859-257-1951
www.uky.edu

PaymentWorks Frequently Asked Questions (FAQs)

Question: What is the new PaymentWorks Vendor Onboarding Application?

Answer: PaymentWorks is the University's new cloud-based vendor onboarding application. The application is integrated with the myUK environment allowing department users to reach the platform utilizing their myUK ID and password. PaymentWorks supports the entire application platform, including support for vendors needing registration assistance. It will replace the University's current paper-based vendor application with its manual entries and updates.

Question: What are the benefits by using PaymentWorks?

Answer: Utilizing a vendor onboarding application such as PaymentWorks allows the University to meet requirements with its underwriters ensuring we are properly vetting and validating vendors prior to entry into the University's vendor database. It checks sanctions and other required compliance in relation to federal funding. It allows the Purchasing Division latitude to move a currently tedious, manual loading process to an automated platform. Departments are empowered in the process and vendors utilize self-service in their registration.

Question: How was PaymentWorks selected to be the contracted provider?

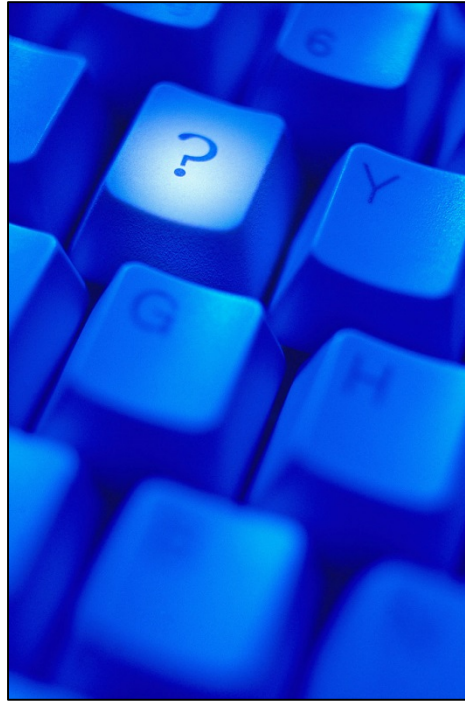
Answer: PaymentWorks was selected as the successful awardee through a competitive Request for Proposals (RFP) process as required by Kentucky law. PaymentWorks provided the best value product in relation to the University's needs and others that responded to the solicitation.

Question: What is the main change for me as a departmental employee with regard to PaymentWorks?

Answer: The main change is simply to use the PaymentWorks invitation process to request new vendor entry rather than the paper-based vendor application. PaymentWorks also empowers and provides visibility for departments into the onboarding process.

Help Resources

- Desktop Quick Reference Card (QRC):
<http://www.uky.edu/Purchasing/docs/paymentworksqrc.pdf>
- Frequently Asked Questions (FAQs):
<http://www.uky.edu/Purchasing/docs/paymentworksfaq.pdf>
- Departmental questions for vendor onboarding can be sent to
Vendorhelp@l.uky.edu
- Search Guide for Existing Vendors in Shopping Carts / Requisitions, PRDs, or SAP T-code XK-03
<http://www.uky.edu/Purchasing/docs/vendorsearch.docx>
- Support for vendor questions is provided by PaymentWorks through a dedicated support ticket system specifically for vendors.



Questions?