

PaymentWorks New Vendor Invitations – Required Personal Message Content

Beginning 7/20/26, each PaymentWorks New Vendor Invitation must reflect a completed Personalized Message conveying to the vendor required information to complete and submit a valid registration. The Personalized Message must indicate the name required of the entity or individual on their registration as well as the required address for the needed transaction. The entity name and address can be found on the quote, invoice (if for PRD), Statement of Work (SOW), Independent Contractor (IC) Form, etc. which precedes start of the procurement transaction. Each new vendor invitation will be reviewed by Procurement Services prior to release onward to the vendor to ensure required information is present.

Role: PaymentWorks Inviters

Frequency: Each PaymentWorks
new vendor invitation

Using the Name Field Correctly

- When sending a PaymentWorks invitation, it's important to use the fields on the invitation as designed. The Name field should contain reference to the entity that the department is planning to engage.
 - If you are planning to transact with a company, organization, school, or agency, enter the business or entity name.
 - Only enter a person's name if the transaction will be directly with that individual (such as an independent contractor or honorarium recipient).
- It's important not to enter combined or placeholder names such as "Person Name / Business Name" as these can create confusion with the proper entity name for the onboarding as well as delays.

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Using the Personalized Message

- Use the personalized message comment box on the invite to clearly define if the registration is for the person specifically or their entity/business.
- If payment will be issued to a person, ask them to register as an individual under their personal legal name and SSN.
- If for an entity/business, use the comments field to convey to the vendor the entity name and address you currently have in hand and are seeking.

Information to Include in Personalized Message

- Note: Personalized Message has a 280-character limit
- Name of department sending invite
- Name of vendor needing to be onboarded
- Reason for onboarding/payment
- Justification document information
 - Document type (scope of work form, quote, invoice, contract, event)
 - Address listed on justification document
- Template:

Hello (individual/business), _____ (your department) is sending you an invitation so you can receive a PO for _____ (reason for order). Per your _____ (justification document), we are expecting to issue the PO to _____ (location on justification document). (What to do if you have any questions).
- Examples:
 - Example 1:

Hello John Smith, COE is sending you a PaymentWorks invite to pay you for speaking at the Future Educators of America event. Per your Scope of Work, we are expecting you to register under your personal legal name at 123 Main St, Lexington, KY 40507. Contact us if incorrect.

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- Example 2:

Capital Construction is sending Johnson Construction LLC a PaymentWorks invite to be added as a vendor to order services from quote #12345. "123 Main St, Lexington, KY 40507", is the address on the quote. Enter alternate remit-to address if applicable. Register using your EIN.

- Example 3:

Facilities Maintenance is sending Electrify LLC a PaymentWorks invite to receive a vendor number to purchase goods from quote #1234. The quote lists "123 Main St, Lexington, KY 40507" and "PO Box 123" as your addresses. Include both on the registration. Register using your EIN.