Quick Reference Card

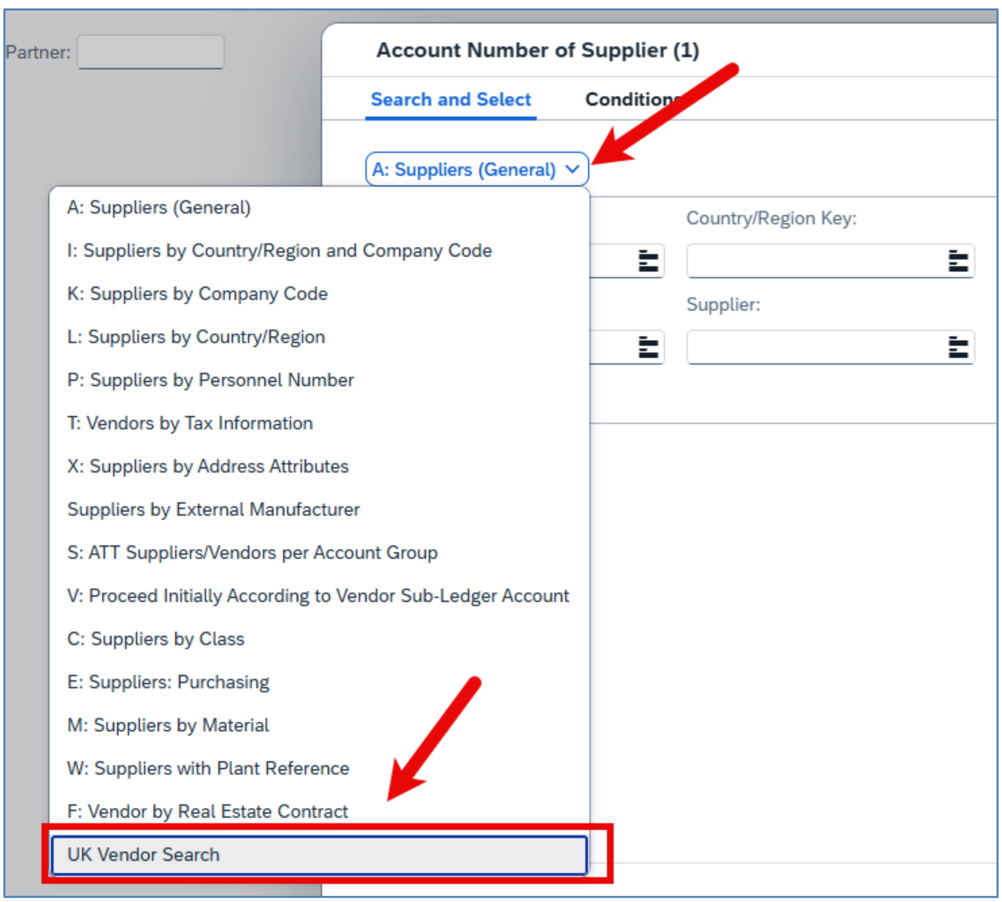
PaymentWorks Inviters – Required Best Practices - New Vendor Invitations and Managing Onboarding Console

Successful procurement and payment transactions begin with accurate determination and selection of correct vendor profile information. Based on their position at the beginning of the transaction stream, departmental staff more so than other parties, determine the overall transaction success with knowledge and assignment of the correct vendor information.

Role: PaymentWorks Inviters	**Frequency:** As Needed

1. Prior to sending a PaymentWorks New Vendor Invitation, ensure to first conduct a thorough search within SAP S/4 Business Partners / UK Vendor Search to verify the needed vendor record is not currently available.

Ensure to pair this exercise with information found in peer document D-02 Vendor Search Requirements and Objective and other documents on our website Learning and Training Page.



Quick Reference Card

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2a. Utilize the Name and Name 2 boxes to conduct wildcard vendor name search. Wildcard searches contain asterisks (*) at the ends and between keywords. Examples:

*Agilent*Tech*

*Barnes*Noble*

*Amy*Chapman*

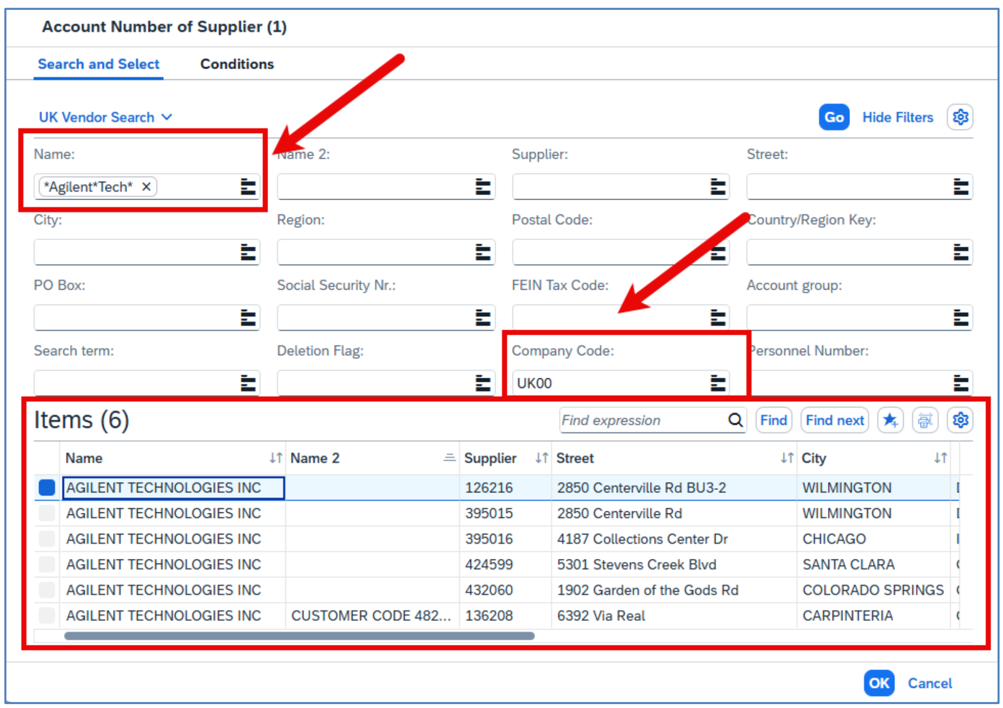
Ensure the Company Code is set to UK00.

Correct and active vendors for use on Requisitions and Payment Request Documents (PRDs) must have these characteristics:

1. They were located under the UK Vendor Search selection, and

2. UK00 Company Code was selected, and

3. The vendor number has a format of 1XXXXX, 3XXXXX, 4XXXXX, or 8XXXXX (for employee vendor numbers).

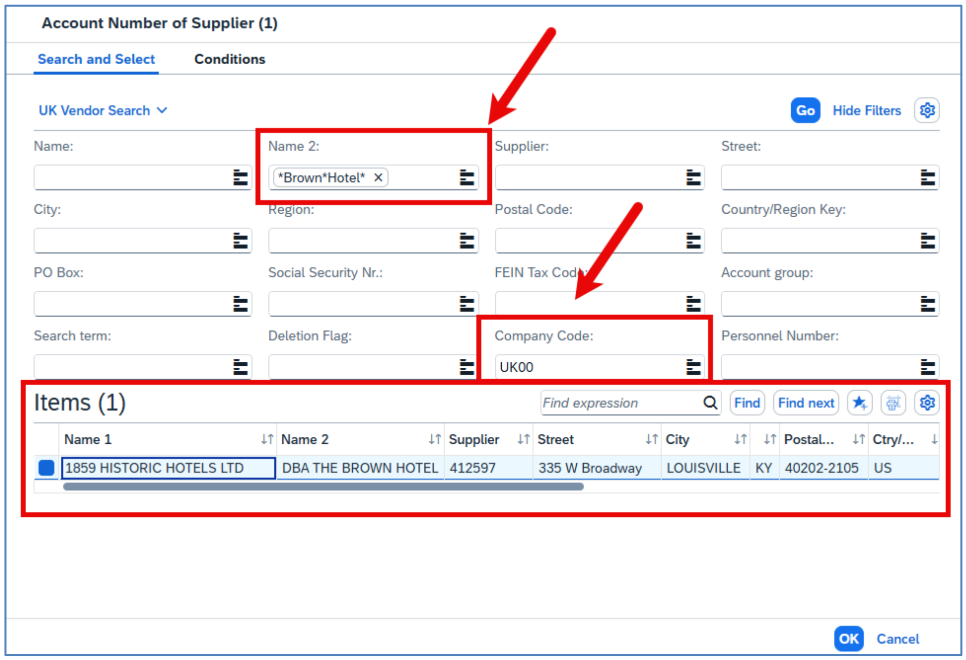


Quick Reference Card

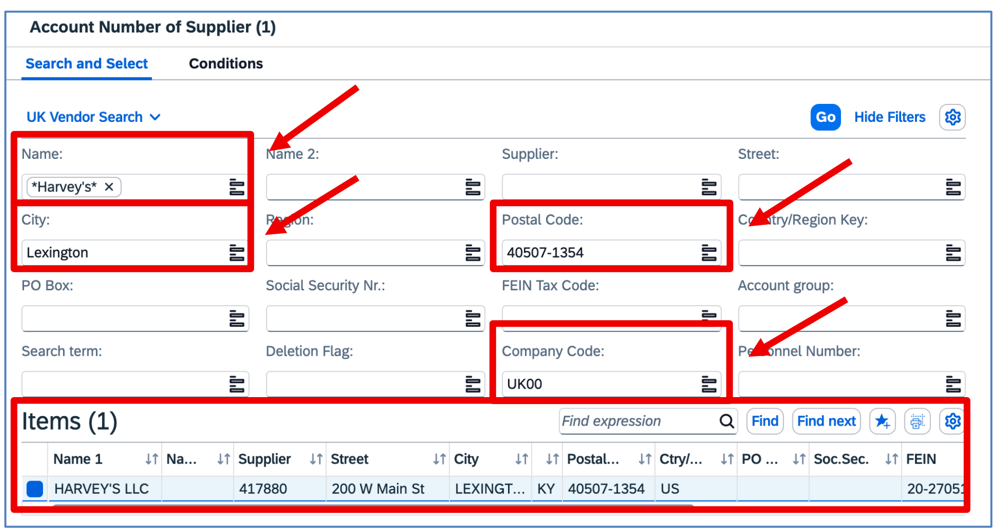
PaymentWorks Inviters – Required Best Practices - New Vendor Invitations and Managing Onboarding Console

2b. Additional Search Requirement: Name 2

Vendor records are based on legal entity names. Performing the same wildcard search on the Name 2 field may reveal the vendor record is available under a different company structure than assumed.



2c. You may also search on a portion or all of the address. Common searches include adding criteria such as city, region, or postal code to narrow results.



PaymentWorks Inviters – Required Best Practices - New Vendor Invitations and Managing Onboarding Console

3. Know and understand the nature of entity or individual being onboarded Ensure to pair this exercise with information found in accompanying document D-02 Vendor Search Requirements and Objective and other documents on our website Learning and Training Page.	• Prior to sending a PaymentWorks New Vendor Invitation, ensure that you know and understand the nature of the entity or individual being onboarded as a new vendor. • There is a requirement to have working documentation (e.g., quote, invoice, Scope of Work (SOW), etc.) that initially substantiates the transaction and confirms the vendor's legal name and address. • Understand whether you are onboarding an entity or an individual • Know the address that you are expecting to use on the requisition or Payment Request Document (PRD) • It's important to refrain from sending a PaymentWorks invitation if the correct vendor name and address needed for the transaction are unknown. • Honoraria: ○ It's important to refrain from sending invitations to an entity/business. Any vendor registrations related to honoraria are typically under the individual's personal information, address, and SSN. See BPM E-7-18 for questions related to honoraria.

PaymentWorks Inviters – Required Best Practices - New Vendor Invitations and Managing Onboarding Console

4. Know and understand the implications of the email address used to send the invitation.	• During the invitation process, it is important to identify the correct recipient when sending an invite. • Ensure to send the invitation to one email address only for the supplier to complete. • Sending invitations to multiple email addresses can create duplicate or conflicting registrations. • If you discover that the email address used for the invitation was incorrect, please cancel the invitation (if available in your console) and resend it to the correct email address. • **Important:** The PaymentWorks vendor email is a secure communication. It must be completed by the email recipient only and should not be transferred to another person to complete. If you learn the recipient does not plan to complete it, request the email of the correct person, cancel the invite, and resend to the person who will complete it. • Ask the vendor "*Are you the appropriate person who will complete the invite and be responsible for its long-term ownership? If not, to whom should I send the invite?*" ○ TIP: Vendor group email addresses are a much better option for long term ownership than a single person's email address.

PaymentWorks Inviters – Required Best Practices - New Vendor Invitations and Managing Onboarding Console

5. Sending an invite to "pre-approve" a vendor when purchase or payment is not imminent or planned is not permitted	• Invitations should only be sent when there is a pending purchase or payment requiring a new vendor registration. • It's important to refrain from sending invitations based on a supplier's general request, possibility of future work, or to "pre-approve" a vendor. They must be supported by a pending transaction need.
6. University Clubs and Student Organizations	• If you are planning to engage a university club or student organization for a purchase or payment, the registration must be sent to the club or organization as an entity. • It cannot be completed under the name or profile information of an officer using their personal SSN. • If needed and they currently do not have one, student organizations may apply for a federal tax ID number for their organization at the IRS website. ○ TIP: When available, ask for a club or organization email address if they have one or that of the advisor. Students transition from club roles upon graduation; PaymentWorks accounts under their email address can no longer be accessed for updates.

PaymentWorks Inviters – Required Best Practices - New Vendor Invitations and Managing Onboarding Console

7. University Employees	• It's important not to send PaymentWorks invitations for onboarding an employee using a standard external vendor number. • These should be transacted via 8XXXXX Employee Vendor Number (Exception: Imprest Cash Custodians) ○ Quick Test – If person receives University payroll, they should be transacted via 8XXXXX employee vendor numbers; this includes graduate students, student employees, post-doctoral scholars, etc.
8. Vendor Address Updates	• If an address update is needed for a vendor transaction, request the vendor to submit the address update in PaymentWorks. Vendors are responsible for submitting address changes through their PaymentWorks account. • Once the vendor confirms they have submitted the update, notify vendorhelp@uky.edu; our team will review and process the update, as applicable. • If the vendor is unable to submit the update or requests that a new account or invitation may be needed, it's important not to send a new invitation. Pause onboarding process and contact vendorhelp@uky.edu; our team will diagnose any issue(s) and provide support and guidance.

PaymentWorks Inviters – Required Best Practices - New Vendor Invitations and Managing Onboarding Console

9a. Sending the PaymentWorks Invitation: Using the Name Field Correctly	• When sending a PaymentWorks invitation, the Name field should contain reference to the entity planned for engagement: ○ 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). • Please refrain from placing combined or placeholder names such as "Person Name / Business Name"; these create confusion for the onboarding resulting in delays.

PaymentWorks Inviters – Required Best Practices - New Vendor Invitations and Managing Onboarding Console

9b. Sending the PaymentWorks Invitation: Using the Personalized Message
 	
Ensure to pair this exercise with information found in accompanying document D-06 PaymentWorks Invite Personalized Message Guide and Templates on our website Learning and Training Page.
	• Use the personalized message comment box on the invite to clearly define whether the registration is for the person specifically or their entity/business.
	
	• If payment will be issued to a person, request they 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 needed (from the quote, invoice, SOW, etc.). They should use their federal Employer Identification Number (EIN) on the registration.
	
	• Needed layout for Personalized Message field:
	    ○ Name of department sending invite
	    ○ Name of vendor needing to be onboarded
	    ○ Short reason for onboarding/payment, e.g., "create an order" or "pay an invoice"
	    ○ Justification document information
	        ▪ Document type (scope of work form, quote, invoice, contract, event)
	        ▪ Address listed on support document
	    ○ Personalized Message has a 280-character limit
	
	• Ultimately, the vendor is responsible for their legal name and address; information provided on the registration determines where the payment will be delivered.
	
	• If you are onboarding a larger group of individuals for one-time event(s) and have limited information available, contact our team for guidance and customized solution.

PaymentWorks Inviters – Required Best Practices - New Vendor Invitations and Managing Onboarding Console

10. Resources for Support and to Stay Up to Date	• Procurement Services website: https://purchasing.uky.edu/, Learning and Training Resources Page • For support needs, contact our vendorhelp@uky.edu email and list pertinent information including vendor name, any existing SAP vendor number(s) involved, address in question, etc. • All inquiries are managed by internal ticket system. You will receive a return ticket number for tracking purposes. Please use same ticket email for responses or follow-up questions. • It's important to refrain from placing any support requests directly with PaymentWorks or on behalf of the vendor; direct needed inquiries to our help email for support. • Note: vendorhelp@uky.edu only accepts direct inbound correspondence from within uky.edu domains. You can include the vendor's name and email if needed on the ticket request for assistance.