

PaymentWorks – Invitation Personalized Message Guide

Determine Whether Transaction is With an Individual or a Business

Before sending a PaymentWorks invitation, determine whether the transaction is with an individual or a business entity.

The same person may operate in either capacity depending on the engagement. For example, John Smith may receive payment personally for an honorarium, while a separate engagement could require payment to John Smith Consulting LLC. Use your supporting documentation to determine who should receive the purchase order and/or payment and instruct the vendor accordingly.

Individual

An individual is a person who should be paid under their personal legal name and SSN.

Examples

- Honorarium recipient
- Guest speaker
- Research participant
- Independent contractor operating as an individual
- Consultant being paid personally

Registration Expectation

The individual would register under their personal legal name, SSN, and personal information.

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Business / Entity

A business or entity should be paid under its legal business name.

Examples

- Johnson Construction LLC
- ABC Consulting LLC
- Nonprofit organization
- Corporation
- Partnership
- University club or student organization with its own EIN
- Consultant operating through an LLC

Registration Expectation

The entity would register under the business's legal name and business information.

Recommended Guidance for Departments

Use language appropriate for your audience.

Communications to Individuals Should Focus On:

- Why they are receiving the invitation
- How they should register
- The name they should register under
- The address they should use
- What to do if the information is incorrect

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Communications to Businesses May Use Procurement and Vendor Onboarding Terminology Such As:

- Vendor registration
- Purchase orders
- Quotes
- Invoices
- Remit-to addresses

Regardless of Audience, the Message Should:

- Identify the expected name for the registration
- Identify the expected address(es) for the transaction
- Reference the supporting documentation used to determine that information
- Provide a method for the vendor to report incorrect information before registration

Additional Guidance: Use the Supporting Documentation as Your Source

The name and address communicated in the Personalized Message should come directly from the department's supporting documentation whenever possible (quote, invoice, Scope of Work, contract, event documentation, etc.).

The purpose of the message is to communicate the name and address the department expects to use for the transaction and allow the vendor to identify any discrepancies before submitting their registration.

Departments should not guess or assume which name or address the vendor intends to use. Instead, communicate the information reflected on the supporting documentation and ask the vendor to contact the department if the information is not correct.

This helps:

- Prevent duplicate vendor records
- Reduce onboarding delays

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- Ensure payments are issued to the correct individual or entity
 - Ensure addresses align with the intended transaction
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Personalized Message Length Reduction Tips

The Personalized Message field has a 280-character limit. If your message exceeds the limit, consider the following:

- Replace "Hello (name)," or "Hello (business)," with simply "Hello," when the person's or business's name is referenced elsewhere in the message.
- Remove unnecessary words and focus on the information the vendor needs to complete the registration.
- Shorten addresses by omitting the city, state, or ZIP Code when the street address alone is sufficient to identify the location.
- Use commonly accepted abbreviations where appropriate.
 - St = Street
 - Rd = Road
 - Ave = Avenue
 - Blvd = Boulevard
- Follow USPS-standard address abbreviations when possible.
- Use document references such as:
 - Per Quote #12345
 - Per Invoice #INV-12345
 - Per SOW
- Replace longer phrases with shorter alternatives:
 - "PaymentWorks invitation" → "PaymentWorks invite" or "PW Invite"
 - "Please contact us if this information is incorrect" → "Contact us if incorrect"

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- "Using the address" → "At"
- "Based on" → "Per"

Example Reduction

Original (Longer)

Hello ABC Consulting LLC, Facilities Management is sending you a PaymentWorks invitation so we can pay Invoice #INV-12345. Per the invoice, please register as ABC Consulting LLC with addresses 123 Main Street, Lexington, Kentucky 40507 and PO Box 555, Lexington, Kentucky 40508. Please contact us if any of this information is incorrect.

Reduced

Hello, Facilities Management is sending you a PaymentWorks invite to pay Invoice #INV-12345. Per the invoice, register as ABC Consulting LLC with addresses 123 Main St and PO Box 555. Contact us if incorrect.

This keeps the essential information while preserving characters for longer vendor names, addresses, or document references.

Personalized Message Templates

Template 1: General Template

Use when a single template is preferred for both individuals and businesses.

Hello (Name/Business),
(Department) is sending you a PaymentWorks invitation related to (reason for payment or purchase). Per the (Quote/Invoice/Scope of Work/Contract), please register using:
Name: (Expected Name)
Address: (Expected Address)
Please contact us if incorrect.

Example:

Hello Jane Doe,
Research Administration is sending you a PaymentWorks invite related to participation in a

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research study. Per the Participant Agreement, please register using:

Name: Jane Doe

Address: 123 Main St, Lexington, KY 40507

Please contact us if incorrect.

Template 2: Individual

Tone: Plain language, action-oriented

Hello (Name),

(Department) is sending you a PaymentWorks invite to pay you for (service/event). Per your (Scope of Work/Agreement/Form), please register under your personal legal name at (Address). Contact us if incorrect.

Example

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, please register under your personal legal name at 123 Main St, Lexington, KY 40507. Contact us if incorrect.

Template 3: Business Vendor (Quote-Based Purchase)

Tone: Procurement-friendly

Hello (Business Name), (Department) is sending you a PaymentWorks invite to establish your vendor record and place an order for (goods/services). Per Quote # (quote #), register as (business name) using (expected address). Enter a separate remit address if listed on the invoice.

Example

Hello Johnson Construction LLC, Capital Construction is sending you a PaymentWorks invite to establish your vendor record and place an order for services. Per Quote #12345, register as Johnson Construction LLC using 123 Main St, Lexington, KY 40507. Enter a separate remit address if listed on the invoice.

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Template 4: Business Vendor (Invoice Payment)

Tone: Direct and payment-focused

Hello (Business Name), (Department) is sending you a PaymentWorks invite to pay Invoice # (Invoice Number). Per the invoice, register as (Expected Entity Name) with address(es) (Expected Physical Address) and (Expected Payee Address). Contact us if incorrect.

Example

Hello ABC Consulting LLC. Facilities Management is sending you a PaymentWorks invite to pay Invoice #INV-12345. Per the invoice, register as ABC Consulting LLC with addresses 123 Main St, Lexington, KY 40507 and PO Box 555, Lexington, KY 40508. Contact us if incorrect.

Key Principle

The Personalized Message should not simply tell the vendor that they are receiving an invitation. It should communicate the name and address the department expects to use for the transaction, based on the supporting documentation in hand, and give the vendor an opportunity to identify any discrepancies before the registration is submitted. This helps ensure the vendor record created matches the department's transaction needs and reduces downstream payment and procurement issues.