This guide is designed for Columbia University students to assist you with the vendor setup process if you are providing services to the University, such as, but not limited to: note takers, musicians, translators, interpreters, or service providers supporting University events. This guide will cover how to create a PaymentWorks account and complete key fields in the New Vendor Registration form.

As an enrolled student, you do not need to register as a vendor in order to be reimbursed for travel and business expenses. Speak with your School or Department finance administrator to be reimbursed for expenses via Concur. However, as a prospective student requiring travel and expense reimbursement, you must register as a vendor.

**Note:** The intent of this document is act as a general guide. If you have specific questions related to taxation, you should seek out a tax professional for advice.

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Creating a PaymentWorks Account

You will receive an email invitation from Columbia University asking you to create a PaymentWorks account and complete the New Vendor Registration form.

1. To start the process, click on the Click Here link in the email you receive.

The PaymentWorks window appears,

2. Click Join Now.

3. Complete all the fields to create your PaymentWorks account.
4. Click to agree to the Terms of Service and Join Now.

You will receive a verification email.
5. From the email you receive, click **Verify Your Email and Complete Your Registration**.

The New Vendor Registration Welcome screen appears.

Click the **Next** button to begin completing the New Vendor Registration form.

**Note:** To access your PaymentWorks account in the future, be sure to use the [Vendor login](#) and not the login link for Columbia employees.
Completing the New Vendor Registration Form

Complete all required fields in the New Vendor Registration form indicated with a red asterisk * The steps below are designed to provide general guidance on completing key sections and fields on the form.

Completing Tax Information

1. As a student, always select **Individual, Sole Proprietorship, or Single-member LLC**. Additional fields will appear on the form.

2. Select your **Country of Citizenship**.

3. If you are a **US citizen or US legal resident**, select the **SSN** (social security number) option.

4. Enter your name as it appears on your birth certificate for **Legal First Name** and **Legal Last Name**.

5. If you are a US citizen or US legal resident, enter and confirm your **SSN**. If you are an International Student, enter the appropriate **Tax Number**.
Generating or Submitting Tax Forms

US Citizens and US Legal Residents:
Select **Yes** for **Generate Electronic W-9**. PaymentWorks will automatically generate the IRS tax document.

**Note:** If you select **No** you must manually complete and upload Form W-9. PaymentWorks provides a link to the blank Form W-9 and the functionality for you to select and upload the completed form.

International Students:
Upload the correct **W-8** or **W-9** form. If you have specific questions regarding the appropriate form, consult your tax advisor. Ensure the completed and signed forms are accurate and that your name and address on the form matches the one you entered in this New Vendor Request form.

You can upload any W-8 form that applies, including a W-8BEN, W-8 ECI, W-8 IMY, W-8 EXP, or 8233. You can find tax forms [here](#).

**Note:** If you upload a W-8 form, be sure to enter the W-8 Signature Date in the Additional Information section of this New Vendor Registration form.
Completing Personal Information

1. Enter your **Full Name** as appears on your birth certificate, your **Telephone Number** and **Preferred Email**. If you have a **Website**, you can enter the URL.
2. Enter your **Description of Goods or Services** to describe the service you are providing the University.
3. Click the **Next** button to move to the Addresses tab.

Completing Your Primary Address

1. Select the **Country** of your primary residence. For international students, this should be your home country.
2. Enter the **Street**, **City**, **State/Province/Region** and **Zip/Postal Code** of your primary residence.
Completing Your Remittance Address

Your **Remittance Address** is either the address you provided your bank when you set up your account (if receiving payments by direct deposit or wire) or the address where you will receive payments by check. For international students, the address to receive payment by check must be your US address and reflect the address on your form W8.

If the Remittance Address is the same as your Primary Address above, select **Same as Primary Address**.

If the Remittance Address is not the same as your Primary Address complete the required fields. Your remittance address can be your address while attending Columbia University.

1. Select the **Country** of your remittance address.
2. Enter the **Street, City, State/Province/Region** and **Zip/Postal Code** of your remittance address.
3. Click the **Next** button to move to the Additional Information tab.
Completing Additional Information

The Additional Information page may initially appear blank, click the Next button to proceed.

1. Select either **US Individual** (US Citizen or US Legal Resident) or **Foreign Individual** (International Student) from the **Supplier Category** dropdown.

   If you selected **US Individual**, you will be asked to select the **1099 Tax Information for Individuals**, which is the form used by Columbia to report your income to the IRS and state tax authorities and is also sent to you for the purpose of preparing your tax returns.

   Select the item that best reflects the type of income you are receiving from Columbia, mostly likely **Non-employee compensation (self-employment income)**.

2. Select the **Vendor Classification** role that best reflects the service you are providing (most likely Supplier of Goods and Services, but could also be Other PaymentsTypes).

   If you select Other Payments, you will be asked **What are you receiving Payment for?**
Note: If you are a current student, do not select Reimbursement for business expense. As a current student, you do not need to register as a vendor in order to be reimbursed for business expenses. Speak with your School or Department finance administrator to be reimbursed for expenses via Concur. Prospective students requiring expense reimbursement must select this option.

3. Make your Purchase Order Information selection based on a conversation with the appropriate personnel in the Department for which you are providing the service.

If you selected Foreign Individual in step 1, you will be asked about Foreign Individual Tax Information. Indicate Yes to the question Will you be performing services in the US? if the service will be provided in the US. If you indicate Yes, the fields for the Visa and Passport information appear. Complete and upload the requested Visa and Passport information.

If you uploaded a W-8 form in the Generating or Submitting Tax Forms section, enter the W-8 Signature Date.
4. Read the instructions and make the appropriate selections to answer the questions regarding **Conflict of Interest Information**. A conflict of interest can be described as a situation in which a person is in a position to derive personal benefit from actions or decisions made in their official capacity.

If you are a US Individual or Foreign Individual, you are the only person at your company. Answer these questions based on whether you are or were formerly employed by Columbia University or related to anyone who is.

![Conflict of Interest Information](image)

5. Under **Payment Information**, select if your **Bank Location** is a US Bank or Foreign Bank.

![Payment Information](image)

Additional fields appear based on your selection:
US Bank:
Select the Payment Method of either ACH (direct deposit) or No ACH (Check or Wire). ACH is the preferred payment method. If you are not being paid via ACH, you must provide a justification for choosing another payment method.

If you select ACH, you must complete the Banking Information section.

If you select No ACH, you must select either Check or Wire and provide Check or Wire Payment Method Comments / Justification. Selecting Wire will also require you to complete the Banking Information section.

Foreign Bank:
Select the Payment Method of either Wire or Wire Not Available (Check). Wire is the preferred payment method. If you are not being paid via Wire, you must provide a justification for choosing another payment method.

If you select Wire, you must complete additional Payment Information and the Banking Information section.

If you select Wire Not Available, you must provide Foreign Wire Not Available Payment Method Comments / Justification.

- Enter the Beneficiary Bank IBAN, if available, or NA, if not. Utilize this website to see if your bank is using IBAN. If you cannot locate the country of your bank, it is using a SWIFT code. If you enter NA, you must enter a SWIFT code in the Banking Information section.

- Select Yes or No if you are using an intermediary bank, which may be needed if international wire transfers are occurring between two banks in different countries that don't have an established financial relationship. If you select Yes, additional fields appear for you to enter the Intermediary Bank Details.
Completing Banking Information
The Banking Information section will only appear if you select ACH or Wire in the Additional Information section.

1. Complete the fields as indicated.
2. For a US Bank, enter the **Routing Number** (leave the SWIFT Code blank). **Foreign Banks** do not have a Routing Number, instead, enter nine zeros “000000000”. If you did not enter an IBAN in the Additional Information section, enter the **SWIFT Code**.
3. Upload your **Bank Validation File**. Note the criteria regarding acceptable forms of validation documents.
4. Enter your preferred **Email Address for Payment Notifications** and select **I Agree** to the **Bank Authorization**.
Completing the Bank Address

1. Select the **Country** of your bank address.
2. Enter the **Street**, **City**, **State/Province/Region**, and **Zip/Postal Code**.

Submitting the New Vendor Registration Form
After entering all required fields, click the **Submit** button.
After Columbia approves your new vendor registration, you will be notified via email.

Tracking Your Vendor Onboarding Status
You can track the status of your connection to Columbia and other customers you may have connected to using PaymentWorks.

Login to your PaymentWorks Account and click the **Connect** tab.

Your onboarding status appears in the **Customer Registrations** box. The Active Connections show customers that you are connected to via PaymentWorks.
Updating Your Profile Information

After you have submitted a New Vendor Registration form, your Profile will be created; this is where you can update your business/personal information as needed. To review and/or update your registration information, click the Company Profile link in the top right corner of your screen. Refer to the Updating Company Profile Information web tutorial.

1. Login to your PaymentWorks Account and click the Company Profile tab.
2. Click the appropriate tab from the left side to update:
   - **Marketing Information** – Basic information such as Company Name (DBA) and contact information.
   - **Business Details** – Tax information such as Tax Country, Tax Identification Number, and Classification
   - **Tax Forms** – Upload or update any required tax documents
   - **Remittance Addresses** – Manage the Remittance Addresses where Columbia University can submit payments. The Bank Accounts tab does not appear if no Remittance Address is indicated.
   - **Banking Accounts** – Add or update your banking information. Click here for more details on adding Bank Accounts.

Updating Columbia Specific Information

As a PaymentWorks vendor, you may need to manage information specific for Columbia that does not apply for your other customer(s).

1. Log in to your PaymentWorks account and click the Connect tab.
2. Click the Columbia link under the Customer Registrations section. The form appears where you will be able to make updates.

**Note:** Making any change to Columbia Specific Information involves making changes to the New Vendor Request form you originally submitted, which will require you to re-upload all attached documentation.
Invoices and Remittances
PaymentWorks will only display the invoices that were Paid or Rejected (not in process). Inquiries regarding invoice or payment status should not be made through PaymentWorks.
To view your payments being processed by Columbia, refer to the Columbia Finance AP Payment Status & Remittance page where you can look up Payment Status and Remittance Information. You will need your Columbia Vendor ID to lookup Payment Status and Remittance information: refer to the ARC Vendor ID Lookup page where you can search for your Vendor ID Number in our financial system (ARC).

Getting Help
If you have questions regarding the PaymentWorks platform or the PaymentWorks Registration process, you can search the PaymentWorks Support Center topics or contact PaymentWorks Support.
For questions regarding Columbia’s specific vendor management process, please visit our Vendor Management homepage. If you still have questions, you can contact the Columbia University Finance Service Center.