

Check List for Departments

PaymentWorks

OVERVIEW:

1. Obtain a valid email address from your Vendor of the individual authorized to securely update their account information in our PaymentWorks Vendor Portal.
2. Submit a PaymentWorks invitation to your Vendor to update an existing Vendor Number or setup a new Vendor Number.
 - a. NOTE: If your Vendor provides different Tax information than the information existing in our SAP database, a NEW vendor number will be created. If the Tax information stays the same, the existing vendor number will be updated once the Vendor's registration is approved.
3. Process your invoice for payment to your Vendor.
 - a. NOTE: Our invoice payment request process does not change.

Your Department should be prepared with the following information so you can send your PaymentWorks invitation.

PaymentWorks Invitation:

Your Department is the responsible party to send a PaymentWorks invitation to the Vendor.

1. PaymentWorks Link: <https://www.paymentworks.com/login/saml/?idp=jhu>
2. Click the PaymentWorks "Send Invitation" button (left bottom side of the page under the search filters)
 - a. **Company or Individual Name**
 - i. This is the name of the vendor
 - b. **Contact E-Mail**
 - i. This is the vendor's email address. The invitation will be sent to this address.
 - c. **Name of Invitation Sender**
 - i. This is **your** name.
 - ii. Please provide your complete name.
 - d. **Purchasing Organization**
 - i. Choose from the drop down, "JHU or JHHS" as appropriate.
 - e. **Business Area**
 - i. Choose from the drop down your appropriate Affiliate Business Area.
 - f. **Vendor Type**
 - i. Choose from the drop down, your appropriate vendor type:
 1. "Purchasing Vendor"
 - a. This will create/update a Shopping Cart "1" series vendor number and an Accounts Payable "2" series vendor number.
 2. "Honorarium or Participant"
 - a. This will ONLY create/update an Accounts Payable "2" series vendor number.
 - b. NOTE: An honorarium is an ex gratia payment (i.e., a payment made without the giver recognizing themselves as having any liability or legal obligation) made to a person for their services in a volunteer capacity or for services for which fees are not traditionally required. This is used by groups such as schools or sporting clubs to pay coaches for their costs. Another example includes the payment to a guest speaker at a conference to cover their travel, accommodation, or preparation time.
 3. "Royalty Payment"
 - a. This will ONLY create/update an Accounts Payable "2" series vendor number specifically used for royalty payments.
- g. **Description of Product/Service**
 - i. A short description of the vendor's service and/or product that warrants the payment.

- h. **Anticipated Spend**
 - i. The amount you intend to spend, in USD
 - 1. Enter the total amount estimated for your invoice payment(s).
 - i. **Services Provided**
 - i. Choose from the drop down, your appropriate option:
 - 1. "Product": Choose if the Vendor is providing ONLY product.
 - 2. "Services (Within US)": Choose if the Vendor is a USA Vendor providing services or an International Vendor providing services on USA soil.
 - 3. "Services (Outside US)": Choose if the Vendor is providing services remotely from another country or providing services in another country.
 - 4. "Legal Services": Choose if the Vendor is providing legal services.
 - 5. "Rental": Choose if the Vendor is providing rental services.
 - 6. "Utilities": Choose if the Vendor is providing utility services.
2. Click the "Send" Button.
- a. NOTE: Your invitation will be sent to the Johns Hopkins PaymentWorks Invitation Approver before the email invitation is sent to the Vendor. This will confirm you have provided all required information before the Vendor receives the emailed invitation. *Note it may take 1-2 days for the Vendor to receive the email invitation.*
 - b. Vendor status will be provided in PaymentWorks.
 - i. PaymentWorks Status Terminology Helpful Guide, <https://ssc.jhmi.edu/accountspayable/DataFiles/PaymentWorks%20VENDOR%20STATUS%20TERMINOLGY.pdf>
3. If your Vendor request shows "Approved" in PaymentWorks more than 3 business days, submit a Service Ticket.
- a. Service Now Ticket Portal: <https://jhuprocoreprod.service-now.com/>
 - i. Choose Vendor Inquiry.
 - ii. Provide the Vendor's name.
 - iii. Request assistance by clearly stating that the Vendor was "Approved" in PaymentWorks for at least 3 business and a Vendor number has not generated for your Vendor.
4. Once your Vendor Number is created:
- a. Our payment processes do NOT change. Your department is still responsible for submitting your invoices for payment.
 - b. Your Vendor will have access to view ALL processed invoice payments through their PaymentWorks Account.
 - c. Your Vendor will have access to securely update their Vendor information in our database through their PaymentWorks Account.
5. If your Vendor has difficulty with their Paymentworks registration and/or account updates, they should contact support@paymentworks.com for further assistance.