UH System Vendor Management

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Meet The Vendor ID Team

- Cissy Bean, AP Manager
- Chunling Lin, Vendor ID Specialist 2
- Nilda Vasquez, Vendor ID Specialist 1
- Jatarra Mayhue, Vendor ID Specialist 1
What value does PaymentWorks bring to the UH System?

- Eliminate Payments Fraud
- Ensures Compliance
- Trust your vendor identity information
- Eliminate #1 Pain Point in Procure to Pay Process

Vendor Onboarding: A Time-Saving Process

<table>
<thead>
<tr>
<th>PeopleSoft</th>
<th>UH System</th>
<th>PaymentWorks</th>
<th>Vendor/Vendor</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Initiate Vendor Invite</td>
<td>2. Send Invitation</td>
<td>3. Create PaymentWorks Account</td>
<td></td>
</tr>
<tr>
<td>5. Screen (TIN, Sanction, etc.)</td>
<td>6. Approve Workflow</td>
<td>4. Complete Registration</td>
<td></td>
</tr>
<tr>
<td>9. Send Notification</td>
<td>11. Approve Updates</td>
<td>10. Update Profile Information</td>
<td></td>
</tr>
</tbody>
</table>
Roles

- **UHS Initiator**
  - Invites Vendors
  - Monitors for Vendor ID Number
- **Vendor**
  - Completes their Info Online
- **PaymentWorks**
  - Collects and Validates Vendor Info
  - Drives to PS, not replace PS’s Vendor Database
- **UHS Vendor ID**
  - Reviews documentation and validation file and determines if we can do business based on the info provided.

Logging In

TIP: If you are on a machine and already logged in to other applications with your usual UHCL, UHD, UHV, or UH credentials, then it will simply bring you to the main screen below. Otherwise, you will see one of the screens to the right. Log in with your usual credentials.
Search For Vendor

Step 1:
• Once logged into PaymentWorks, click on Vendor Master Updates.

Step 2:
• Next click on the New Vendors tab.

Step 3:
• Under Filter Results, you can now search for the vendor via their email address or vendor name.

Next Steps:
• This will bring up the request and provide you a status of it. If no results are found, you will need to invite the vendor.
Inviting a Vendor

Step 1:
• Once logged into PaymentWorks, click on Vendor Master Updates.

Step 2:
• Next click on the New Vendors tab.

Step 3:
• Click on Send Invitation button.

Initiator Video (Link)

https://www.youtube.com/watch?v=FUvTtbGmxoY
Inviting a Vendor

Step 4:

- Invite screen will appear. Fill out the form and click “send” button when completed.
- A confirmation that the invitation has been sent will pop up, click “Ok”.

Sample Vendor Invitation

Sample email that is sent to Vendor after invitation is sent.
Vendor Setup Supplemental Form

Review Invite Status

Step 1:
• Confirm you are on the Vendor Master Updates page.

Step 2:
• Click on the New Vendors tab.
• On the Vendor Master Updates page, click on the New Vendors tab.
• Here is where you can track the status for Vendors.
## Tracking Onboarding

### Invitation Statuses

<table>
<thead>
<tr>
<th>Status</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undeliverable</td>
<td>Invitation delivery was unsuccessful. This usually indicates the contact email address was invalid.</td>
</tr>
<tr>
<td>Cancelled</td>
<td>The invitation has been cancelled.</td>
</tr>
<tr>
<td>Opened</td>
<td>Vendor has opened the invitation email.</td>
</tr>
<tr>
<td>Clicked</td>
<td>Vendor has received the invitation email and clicked on the link to get started.</td>
</tr>
</tbody>
</table>

### ACCOUNT SETUP

- **Invitation column:**
  - Pending Approval
  - Opened
  - Clicked
  - Rejected
  - Undeliverable
  - Cancelled

- **Vendor Account Column:**
  - No Account
  - Registered
  - Email Validated

- **New Vendor Registration column:**
  - Not Started
  - In Progress
  - Submitted
  - Returned
  - Rejected
  - Approved
  - Processed
  - Complete
Tracking Onboarding

Account Statuses

<table>
<thead>
<tr>
<th>Status</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Account</td>
<td>Vendor has not used their invitation to create their account.</td>
</tr>
<tr>
<td>Registered</td>
<td>Vendor account was created but not activated.</td>
</tr>
<tr>
<td>Email Validated</td>
<td>Vendor has created and activated their account.</td>
</tr>
</tbody>
</table>

REGISTRATION

Invitation column:
- Pending Approval
- Opened
- Clicked
- Rejected
- Undeliverable
- Cancelled

Vendor Account Column:
- No Account
- Registered
- Email Validated

New Vendor Registration column:
- Not Started
- In Progress
- Submitted
- Returned
- Rejected
- Approved
- Processed
- Complete
<table>
<thead>
<tr>
<th>Status</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not Started</td>
<td>Vendor has not entered information on their registration.</td>
</tr>
<tr>
<td>In Progress</td>
<td>Vendor has started entering information on the registration but has not submitted.</td>
</tr>
<tr>
<td>Submitted</td>
<td>Vendor has submitted their registration.</td>
</tr>
<tr>
<td>Returned</td>
<td>The registration has been returned to the vendor in order for a correction to be made. The vendor will be emailed directly with the requested correction. They will also receive a message in their “Messages” tab.</td>
</tr>
<tr>
<td>Rejected</td>
<td>The registration has been rejected.</td>
</tr>
<tr>
<td>Approved</td>
<td>The registration has been approved.</td>
</tr>
<tr>
<td>Processed</td>
<td>The registration has been processed and sent to your system of record.</td>
</tr>
<tr>
<td>Complete</td>
<td>The vendor has been notified of their approval, the vendor record has been created, and the vendor number has been issued. The vendor number will appear under “New Vendor Registration”.</td>
</tr>
</tbody>
</table>

When you see the Vendor# under the New Vendor Registration column, this indicates the Vendor is available to use. This will actually be the UHS Vendor ID that we set them up under for use in PeopleSoft!
Sample Initiator Confirmation

Will I get an email when a vendor is finally approved/setup? Yes, if you enable messages!

Johnathan Rose has completed the registration process and now is set up in the ERP system.

The following vendor number has been assigned: 000002345

Vendor connected:
Company Legal Name - Rose, Johnathan
Company DBA - Johnathan Rose
Registration Submitted by - Johnny Rose

For more information about this or other invitations in PaymentWorks, please go to the "Onboardings" page in PaymentWorks.

Best regards,
PaymentWorks Support

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Online Help

- At the top right corner of your PaymentWorks screen, you can click on “Help”.

- Now if you scroll all the way down, on the bottom left you will see Initiator help section.

- You can also click on the video tutorial button on your onboarding screen.
Troubleshooting: Invite Error

Error when sending Vendor invitation. “An invitation was previously sent to this email address”

- PaymentWorks does not allow multiple invitations to be sent to a single email. Someone else may have previously sent the invite.

My vendor did not receive the invite

- Verify that the vendor has checked their spam folder

Initiators have the ability to re-send an invitation. To resend invitation:
  - Click the status in the Invitation column.
  - At the bottom of the Invitation Details screen click “Resend Invitation” button.

Hey, I’d love to get paid, but where’s the invite?

Aw, man. My colleague invited this vendor first...

SPAM??
Troubleshooting

Entered the wrong email address

Departments can correct and re-send invitations with the following invitation statuses: Sent, Delivered, Not Deliverable. To re-send invitation with the correct email address:

- Click on the invitation status.
- Then click on the “Resend Invitation” button.
- Enter correct email address under “Contact E-Mail”
- Click on the “Send” button when finished.

I would love to place this order, but your email doesn’t work...

Troubleshooting

My vendor has not completed the forms

- The vendor will receive emails until the registration is completed or the reminders are cancelled.

- Reminder email notifications are automatically generated, do not re-send invitations unless the vendor notifies you that they did not receive the initial email
  - 1st reminder – three days
  - 2nd reminder – seven days
  - 3rd reminder – 14 days
  - 4th reminder – 21 days
  - 5th reminder – 28 days

Don’t nag me, your system is already following up!
Troubleshooting

My vendor will no longer be used

• Click on the invitation status.
• Then you will want to click on the “Cancel Reminders” button.
• A confirmation screen will appear, click on the “OK” button.

When Will I Need To Use PaymentWorks?

• To Invite New Vendors to UH
• To allow a current vendor to add or change their Remittance Address
• To allow a current vendor to add or change their ACH
Questions you may have...

- **Does PaymentWorks have our current vendor file already?**
  - Yes, but only for reference.
- **Will our current vendors have to re-register in PW?**
  - It is not required unless they need to make a change to the vendor file. However, we will eventually ask vendors that we actively use to setup through PaymentWorks for their protection and ours.

Questions you may have...

- **Do we have to setup a current UHS vendor through PW to pay to them?**
  - No.
- **What if a vendor has multiple email addresses?**
  - One vendor often will. If they are the same tax ID, then they will still be one vendor in our system and PW will keep straight which email address setup each ACH and remittance address.
Summary

- As a UHS Initiator, you can now:
  - Invite Vendors
  - Troubleshoot vendor invite issues
  - Monitor for Vendor ID Number

Questions?

Contacts:
Pam Muscarello, 713-743-3515, pmuscarello@uh.edu
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VendorID@uh.edu
support@paymentworks.com

Additional Resources:
https://uh.edu/office-of-finance/ap-general/

PaymentWorks

- Initiator Video (an introduction to the initiator role)
- Initiator Handbook
- Initiator Training
- PaymentWorks Vendor Registration Supplemental Form