



UTTyler™

THE UNIVERSITY OF TEXAS AT TYLER

PaymentWorks Initiator Role Procedure Guide

July 2025

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UT Tyler
THE UNIVERSITY OF TEXAS AT TYLER

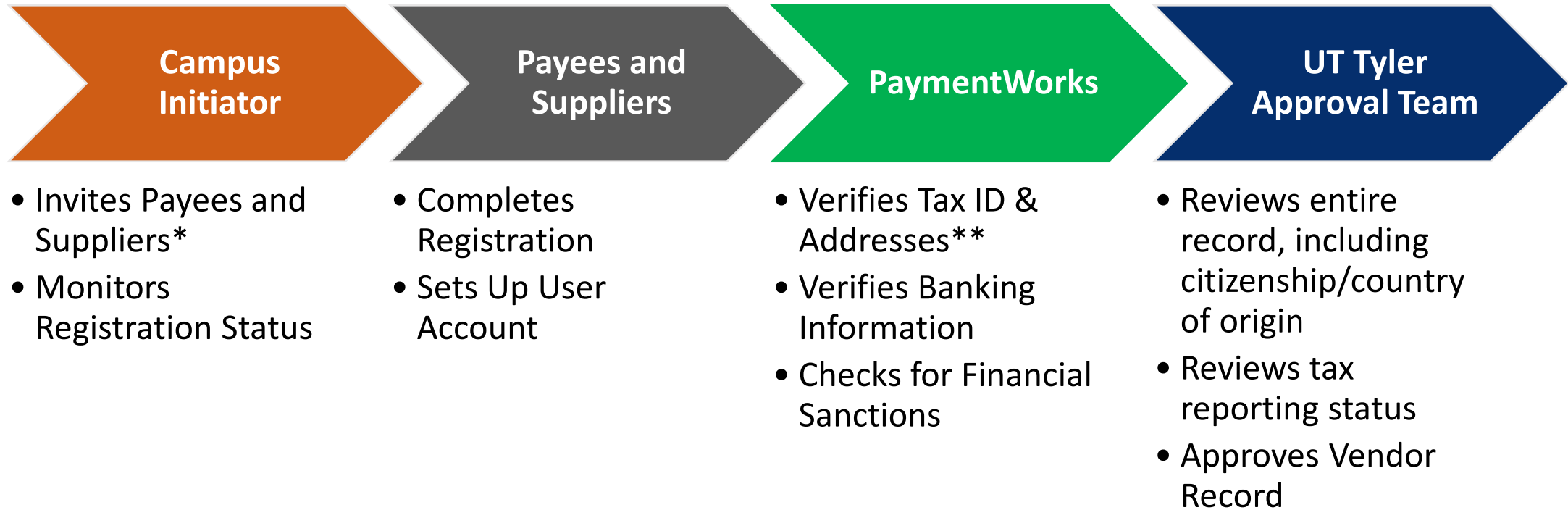
UT Tyler has partnered with PaymentWorks

PaymentWorks is a business identity management platform used to verify suppliers and payees' identity and to ensure compliance.

PaymentWorks mitigates the risk associated with manually collecting information by eliminating the collection of documents through fax, email, snail mail, or in person, and it provides a secure repository for all the information.

Supplier/payees are prompted to join and set up a user account in PaymentWorks. Once a supplier/payee record has been “connected” to PeopleSoft, you will receive an email notification that your supplier/payee has been approved and is ready to use.

Vendor Onboarding Process



*** Note: A valid Payee/Supplier email address is required!**

****Note: Foreign Vendors and Vendors under Financial Sanctions may take additional review and time to process.**

Campus Initiator Role

All UT Share/PeopleSoft support staff will have access to PaymentWorks.
Once users log in, the Initiator Role will be automatically be assigned.

Responsibilities include:



INVITE
SUPPLIERS



TRACK
ON-BOARDING

Navigation & Access

How to Navigate to PaymentWorks

1. From the UT Tyler Faculty/Staff Homepage
 - a. [Faculty & Staff Resources | The University of Texas at Tyler](#)
2. Click on the UT Share subpage
 - a. [UT Share](#)
3. Scroll down the page and select the **PaymentWorks Login** button



PaymentWorks Login

UT Tyler employee user ID and network password required. PaymentWorks is for supplier/payee setup and management. For payroll issues, concerns, or questions please use the above Payroll Services button.

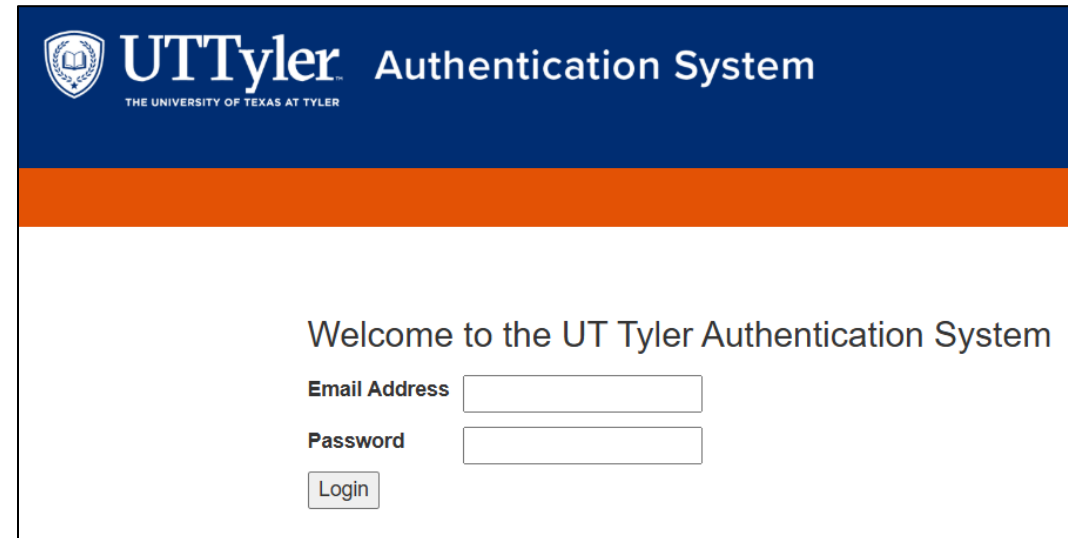


Single Sign-On

You will be directed to the UT Tyler Authentication portal screen and be prompted to enter your single-sign-on ID (UT Tyler email address) and Network Password.

When you enter the required information and click the “Login” button, you may receive the Authentication with DUO security screen.

When you have completed the DUO login, you will be directed to the PaymentWorks home screen.

The image shows a screenshot of the UT Tyler Authentication System login page. The header is dark blue with the UT Tyler logo (a shield with a book) and the text "UTTyler THE UNIVERSITY OF TEXAS AT TYLER" on the left, and "Authentication System" on the right. Below the header is a solid orange horizontal bar. The main content area is white and contains the text "Welcome to the UT Tyler Authentication System". Below this text are two input fields: "Email Address" and "Password", each with a corresponding text box. Below the "Password" field is a "Login" button.

Dual Campus Access

- If you will use PaymentWorks to invite vendors for either or both UT Tyler campuses, your Single Sign On credentials will only work for **ONE** of the PaymentWorks logons.
- If you will need access for the second campus, please email Cindy Troyer (ctroyer@uttyler.edu) and request assistance.


Supplier Invitation Process


Welcome to PaymentWorks!


PaymentWorks

David Fry,
The University of Texas at Tyler

HelpAccountLogout

Setup and Manage Supplier Portal

Messaging

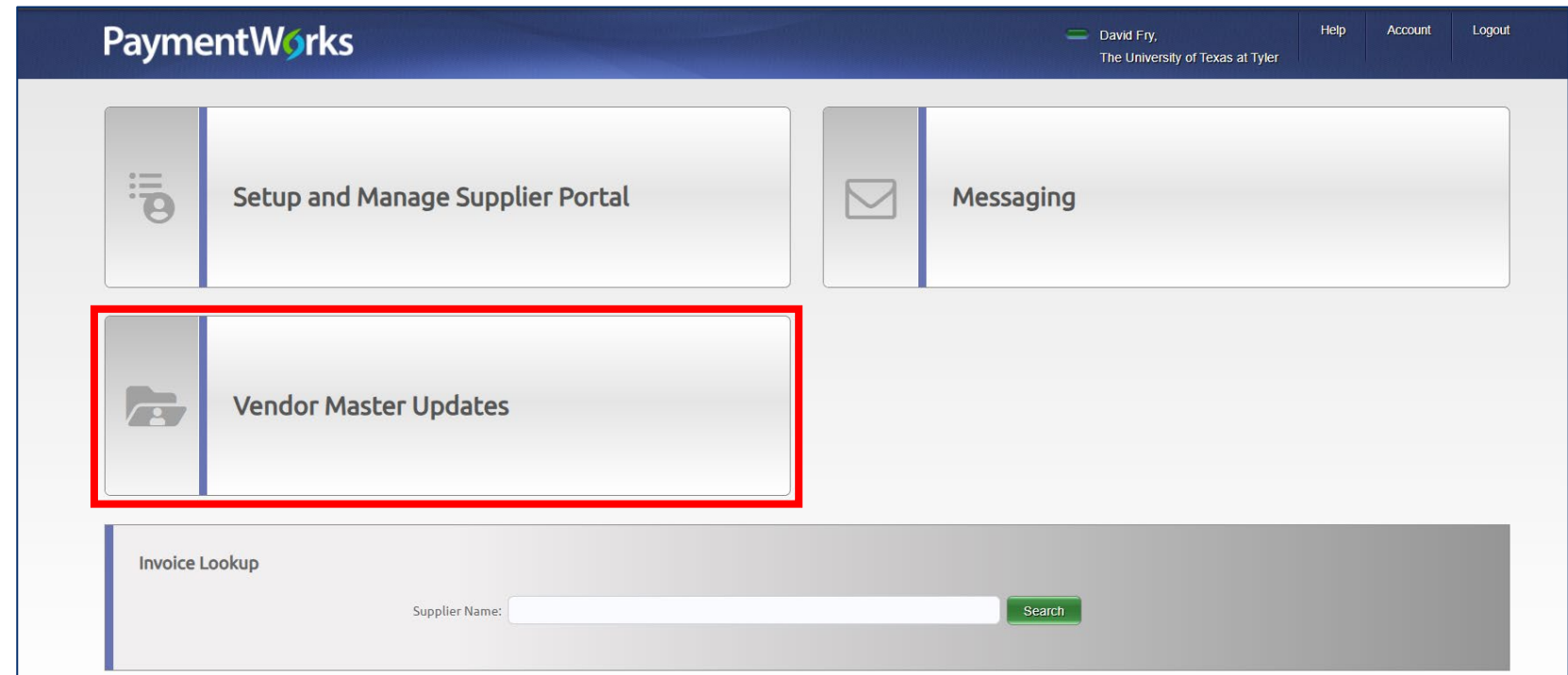
Vendor Master Updates

Invoice Lookup

Supplier Name:

How to Invite a New Supplier or Payee to Register with PaymentWorks

1. Click on the **Vendor Master Updates** button.



The screenshot displays the PaymentWorks web application interface. At the top, the 'PaymentWorks' logo is on the left, and the user's name 'David Fry, The University of Texas at Tyler' is on the right, along with links for 'Help', 'Account', and 'Logout'. The main content area features three large buttons: 'Setup and Manage Supplier Portal' (top left), 'Messaging' (top right), and 'Vendor Master Updates' (bottom left). The 'Vendor Master Updates' button is highlighted with a red rectangular border. Below these buttons is an 'Invoice Lookup' section with a text input field labeled 'Supplier Name:' and a green 'Search' button.

2. Click on the **Send Invitation** button.

PaymentWorks

Home New Vendors

SHOW: Onboarding Tracker

Need help ?

Filter Results: 3828 Records

Vendor Name:

Vendor #:

Contact E-Mail:

Invitation Approval:

Invitation Delivered:

Account Created:

Registration Form:

Show Cancelled Only: ☐

Source:

Invitation Initiator:

Invitation sent: All Dates

Clear Filters CSV

Send Invitation...

Source:

Invitation Initiator:

Invitation sent: All Dates

Clear Filters CSV

Send Invitation...

A video tutorial is available via the **Need Help** link.

3. Complete
**Invite New
Vendor** form &
select **Send**
when
complete.

Invite New Vendor

Company/Individual Name:*

This field is required.

Contact E-Mail:*

Verify Contact E-Mail:*

Description of Goods and Services:*

Initiator Department:*

Initiator Phone Number:

Reason for Inviting this Supplier:*

- Choose One -

Personalized Message:

*Required Field

Cancel Send

Reason for Inviting this Supplier:*

- Choose One -

- Choose One -

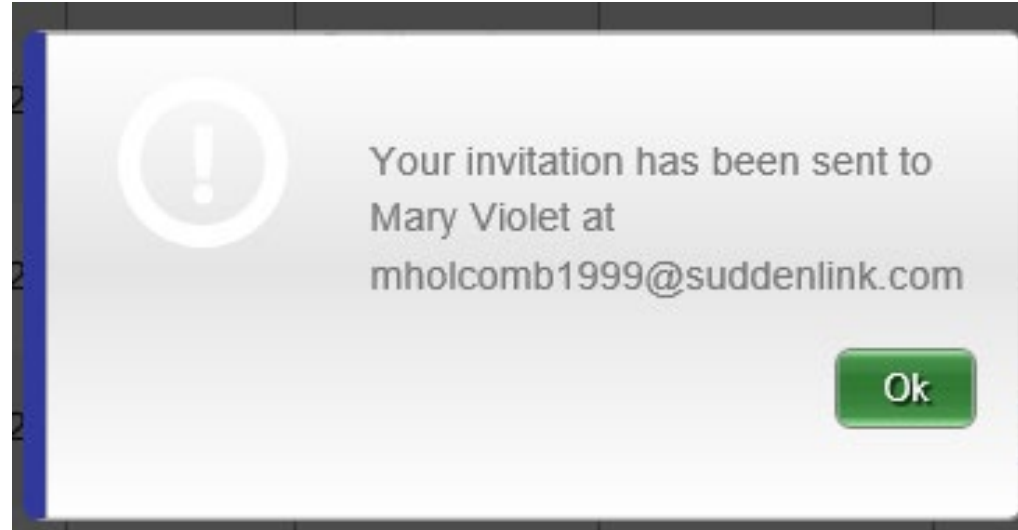
Product

Service

Product and Service

For payments such as Student Awards or Human Research Subject payments please use **"Services"** option.

4. Campus Initiator will receive a confirmation message.

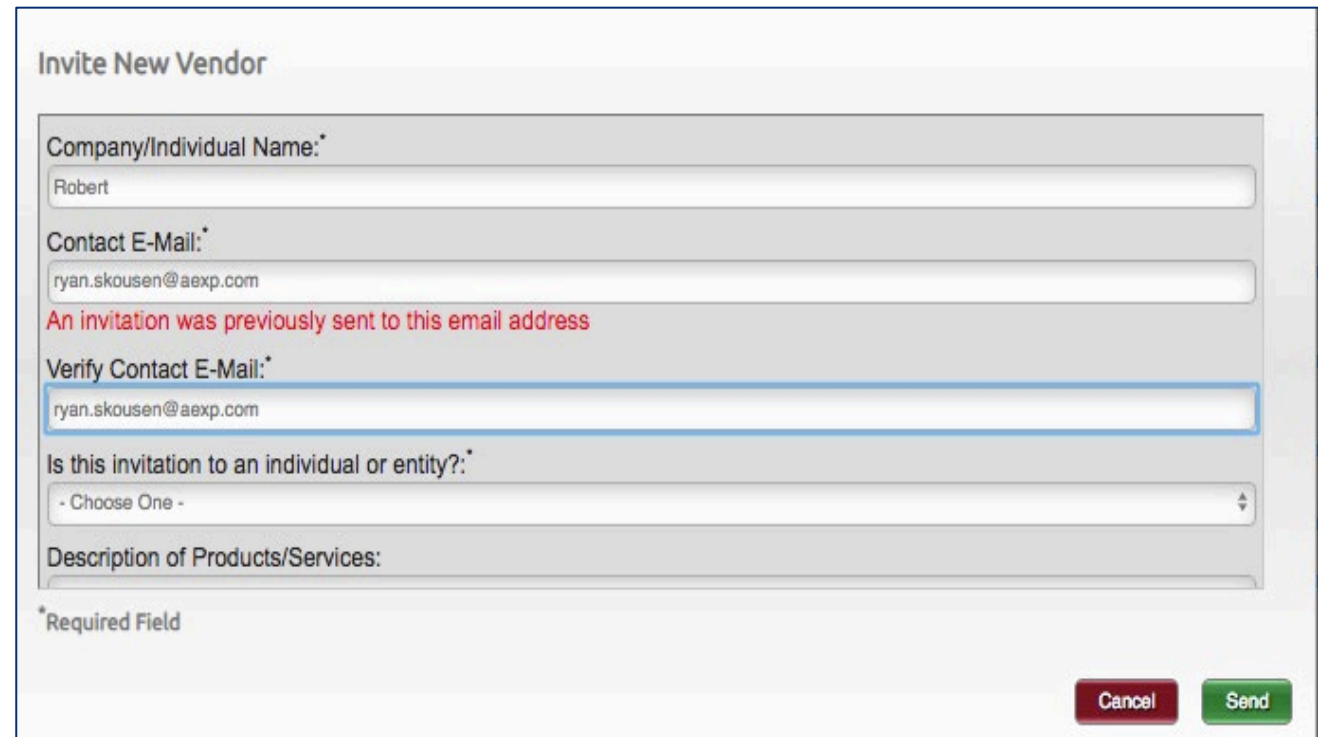


Please note that if an incorrect or bad email address is used, you will receive an error message instead of a confirmation message. Often it may be due to an extra blank space copied over with the email address. You will need to resend the invitation with the corrected email address.

Invitation Error

Error result when sending a Payee invitation. “An invitation was previously sent to this email address”

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



The screenshot shows a web form titled "Invite New Vendor". It contains several input fields: "Company/Individual Name:" with the value "Robert", "Contact E-Mail:" with the value "ryan.skousen@aexp.com", and "Verify Contact E-Mail:" with the value "ryan.skousen@aexp.com". A red error message, "An invitation was previously sent to this email address", is displayed below the "Contact E-Mail:" field. Below the "Verify Contact E-Mail:" field is a dropdown menu labeled "Is this invitation to an individual or entity?:" with the selected option "- Choose One -". At the bottom of the form is a text area labeled "Description of Products/Services:". A legend at the bottom left indicates that an asterisk (*) denotes a "Required Field". At the bottom right are two buttons: "Cancel" (red) and "Send" (green).

Existing Suppliers and Payees

Suppliers and payees converted from the old UT Tyler Systems / HSC instance of Peoplesoft must also be invited to:

- Register to set up a new user account in PaymentWorks
- Update their existing payment information (addresses, bank accounts, etc.)
- Review the status of their payments

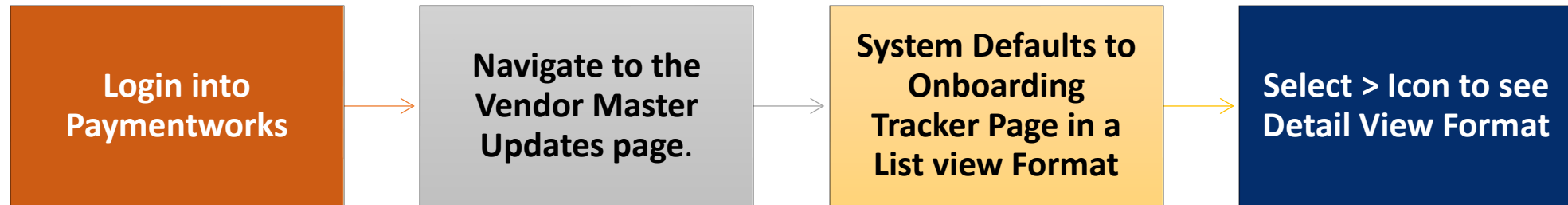
Invitation Status & Tracking

Onboarding Tracker

Onboarding Tracker

The Onboarding Tracker in PaymentWorks is a powerful tool designed to help payers monitor and manage the vendor onboarding process efficiently. This guide provides an overview of its features, including the List View and Details View. It offers insights into tracking vendor registration approvals chronologically with timestamps and additional details about the vendor journey.

Onboarding Tracker Navigation



PaymentWorks Vendor Master Updates

David Fry, The University of Texas at Tyler

Home New Vendors

SHOW: Onboarding Tracker

Onboardings

Sort By: Date modified Descending

Athletic Stuff

INVITATION INITIATED 06/24/2025 3:05 PM

EMAIL VERIFIED - INVITATION RECEIVED 06/24/2025 3:05 PM

ONBOARDING COMPLETE 07/07/2025 4:32 PM

Vendor Number: 0000105685

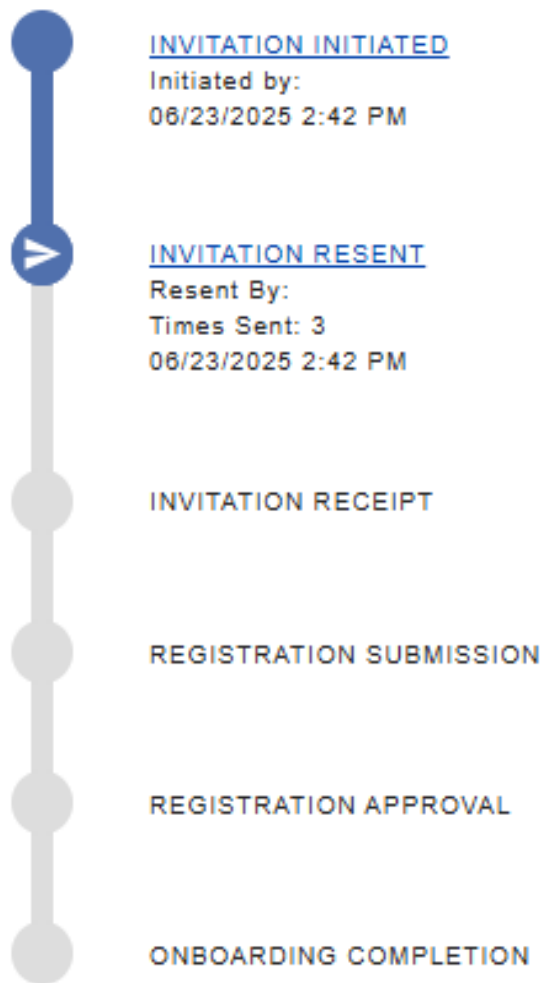
Rush Truck Centers



PROGRESS

INVITATION DETAIL

Onboarding Progress



Onboarding Tracker Detail View Format

Statuses by Step and Tracker Circle (Steps 1 & 2)

1. Invitation Initiation

Invitation Initiated: Invitation sent by the initiator.

Invitation Rejected: Invitation rejected by the initiator's organization.

Invitation Cancelled: Invitation cancelled by the initiator or another payer user.

2. Invitation Approval

Invitation Pending Approval: Invitation awaiting approval from another payer user.

Invitation Resent: Invitation was previously sent but has been resent to the payee.

Invitation Approved & Sent: Invitation approved by the organization or did not require approval and was sent to the payee.

Statuses by Step and Tracker Circle (Steps 3 & 4)

3. Invitation Receipt

Invitation Email Opened: Payee opened the email invitation.

Invitation Link Clicked: Payee clicked on the link in the email to begin registration.

Email Verified - Invitation Received: Payee created a PaymentWorks account and verified their email.

4. Registration Submission

Registration in Progress (no NVR yet): Payee began completing the New Vendor Registration (NVR).

Registration Returned - Pending Resubmission: NVR returned to payee for edits and needs resubmission.

Registration Submitted: NVR completed and submitted for review.

Statuses by Step and Tracker Circle (Step 5)

5. Registration Approval

Registration Submitted - Pending PaymentWorks Review: PaymentWorks is reviewing the payee's banking information.

Registration Submitted - Pending Payee Response: PaymentWorks contacted the payee for further action.

Registration Submitted - Pending Internal Review: Registration is awaiting internal review from the organization.

Registration Resubmitted - Pending PaymentWorks Review: Resubmitted NVR under review by PaymentWorks.

Registration Resubmitted - Pending Payee Response: Resubmitted NVR requires a response from the payee.

Registration Resubmitted - Pending Internal Review: Resubmitted NVR awaiting internal review.

Registration Rejected: Registration was reviewed and rejected.

Registration Approved: Registration reviewed and approved.

Statuses by Step and Tracker Circle (Step 6)

6. Onboarding Completion

Registration Processed: New Vendor record information exported to the organization's ERP.

Onboarding Complete: Payee set up for payment; vendor registration integrated into the ERP and connected to PaymentWorks. Payee can view invoice data in PaymentWorks.

Onboarding Tracker – Colors Summary



Red = This onboarding will not progress since it was rejected or cancelled



Orange = This onboarding will not progress until the payee makes changes to and resubmits their NVR. The changes required are specified in the return message that the payee received



Blue = This onboarding is in progress



Green = This onboarding is complete, and the payee is set up for payment

Onboarding Tracker –Icons Summary



Rejected or Cancelled



Pending



Invitation approved & sent



Invitation email opened



Email verified - Invitation received



Pending review



Pending response



Registration Approved



Registration Processed



Invitation link clicked



Complete/Success



Registration returned -
Pending resubmission



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Invitation Status & Tracking

Verify Supplier / Payee Connected Status

Supplier / Payees with Connected Status

- Two methods to verify Supplier / Payee Connected Status
 - Onboarding Tracker under Vendor Master Updates Tile / Page
 - Suppliers table under Setup and Manage Supplier Portal

Verify Connected Status – Onboarding Tracker

Login into
Paymentworks

Navigate to the Vendor
Master Updates page.

System Defaults to
Onboarding Tracker
Page

Filter results by
searching for a
specific “Vendor
Name” or
Completed
“Registrations
Forms”.

Need help ?

Filter Results: 2986 Records

Vendor Name:

Vendor #:

Contact E-Mail:

Invitation Approval:

Invitation Delivered:

Account Created:

Registration Form:

Show ☐

Onboardings

Sort By: Need help ?

Athletic Stuff		
INVITATION INITIATED 06/24/2025 3:05 PM	EMAIL VERIFIED - INVITATION RECEIVED 06/24/2025 3:05 PM	ONBOARDING COMPLETE 07/07/2025 4:32 PM Vendor Number: 0000105685 >
VS Athletics		
INVITATION INITIATED 06/25/2025 2:22 PM	EMAIL VERIFIED - INVITATION RECEIVED 06/25/2025 2:22 PM	ONBOARDING COMPLETE 07/07/2025 8:45 AM Vendor Number: 0000105678 >
Gipper Media Inc		



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Verify Connected Status – Suppliers Table

Login into
Paymentworks

Navigate to the Setup
and Manage Supplier
Portal

Click on Suppliers tab

Filter results by
searching for a
specific
“Supplier Name”
or “Connected”
records

Need help ?	SUPPLIER NAME ^	VENDOR NUM	SITE CODE	STREET	CITY	ST/ PRV	ZIP CODE	COUNTRY	CONTACT EMAIL	CONNECTED
Supplier Name: <input type="text"/>	Adam Testerman	0000103420 ◀ <input type="text"/> ▶ ◀ <input type="text"/> ▶	ONL-PW-1 2 ◀ <input type="text"/> ▶ ◀ <input type="text"/> ▶	6804 N Bellefontaine Ave	Gladstone	MO	64119- 1139 ----	US	ADAM.TESTERMAN@GMAIL .COM ...	●
Vendor Number: <input type="text"/>	Brianne Borden	0000103368 ◀ <input type="text"/> ▶ ◀ <input type="text"/> ▶	ONL-PW-1 2 ◀ <input type="text"/> ▶ ◀ <input type="text"/> ▶	131 Deer Creek Dr	Aledo	TX	76008- 3901	US	CONTACT@YOGAFORALLM USICIANS.COM	●
Contact Email: <input type="text"/>	Brinkmann Instruments Inc dba ...	0000103393	ONL-PW-1 2	9250 Camden Field Pkwy	Riverview	FL	33578- 0522	US	CUSTOMERSUPPORT@ME TROHMUSA.COM	●
Connected: <input type="text"/> Connected Only ▼										
Clear										

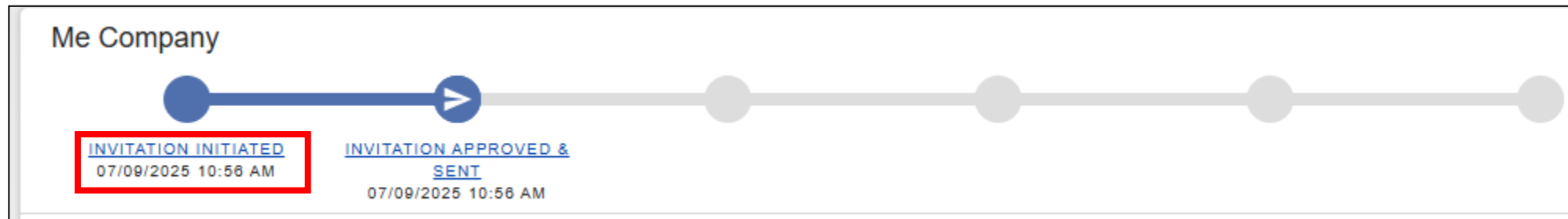
Note: Once a Supplier/Payee is in Connected status and has an assigned PeopleSoft vendor ID, everything else is done in PeopleSoft (reviewing addresses, entering Requisitions and Vouchers).

Tips, Tricks & FAQs

Tips & Tricks and FAQ

- ✓ If a supplier/payee will not be used after an invitation has been sent, you can cancel the invite by disabling invitation reminders. This is completed by:

1. Click on the Invitation Initiated hyperlink and viewing the **Invitation Detail** page.



Note: You would use the same navigation to review the Payee general onboarding information and resend an invitation

Payee general
onboarding
information

2. Clicking on the Disable Reminders button

PROGRESS			INVITATION DETAIL		
Invitation Details					
Initiator: Mary Holcomb (mholcomb@uttyler.edu)	Vendor Name: Me Company	Contact E-mail: mvtg5688@gmail.com	Initiated: 07/09/2025	Email Sent: 07/09/2025	Invitation Reminders: Enabled
Personalized Message Please complete					
Initiator Fields: Description of Goods and Services: goods Initiator Department: Financial Initiator Phone Number: 903-535-1144 Reason for Inviting this Supplier: Service					
			Disable Reminders ✕	Resend Invitation ↺	

Disable
Reminders
Button

Resend Invitation
Button

Tips & Tricks and FAQ, cont.

- ✓ Do not re-send invitations unless the payee notifies you that they did not receive the initial email.
- ✓ The Initiator will receive email updates whenever registration status changes.
- ✓ The payee will receive emails until the registration is completed, or the reminders are cancelled.
- ✓ PaymentWorks automatically generates a series of reminder emails for a supplier/payee who has not clicked on the link in the invitation.
 - 1st reminder – three days
 - 2nd reminder – seven days
 - 3rd reminder – 14 days
 - 4th reminder – 21 days
 - 5th reminder – 28 days

Tips & Tricks and FAQ, cont.

- ✓ You can correct an email address on an invite by clicking on the Resend Invite button and entering the correct email address.
- ✓ Cancel reminders for a first invite when you must correct a supplier/payee email address, otherwise the initial email address will continue to generate reminder emails.
- ✓ A supplier/payee invitation cannot be deleted but it can be cancelled.
- ✓ Supplier/payees in an Approved status and properly interfaced with PeopleSoft will display a connected status with a PeopleSoft vendor number.
- ✓ You can resend an invite only if the **Invitation** column status shows **Sent**, **Delivered**, **Opened**, or **Clicked**.

Tips & Tricks and FAQ, cont.

- ✓ Foreign supplier/payees without an IRS issued tax ID (TIN) must first contact the A/P team to request a temporary TIN. TINs are required for PaymentWorks account setup.
- ✓ Foreign Vendors and Vendors under Financial Sanctions may take additional review and time to process.
- ✓ If you are asked by a third party to set UT Tyler up on a similar automated or electronic payee platform, contact the Accounts Payable team. The Accounts Payable team in coordination with the UT Tyler Legal office will establish user accounts on behalf of UT Tyler.

PaymentWorks Online Help

- ✓ Located at the top right corner, the **Help** button is available to assist you with navigating and moving between screens.



PaymentWorks Online Help, cont.

In addition, there are many Video Tutorials available by clicking on the **Help Icons** located throughout the PaymentWorks system.



Contact Information

- ❖ For UT Tyler **Initiator** PaymentWorks access questions:
 - Email: ctroyer@uttyler.edu

- ❖ For supplier/payee questions about the **PaymentWorks** platform:
 - The supplier/payee should click on the Help link to submit a request.
 - Please do NOT send a supplier/payee this procedure guide. It is only for UT Tyler support staff/Initiators.

- ❖ For supplier/payee questions about items on the Registration Questionnaire:
 - UT Tyler Accounts Payable team Email: Accounts_Payable@uttyler.edu

Questions?