

Update Legal & DBA (doing business as) Name

Before making changes, ensure you've updated the information with the IRS to reflect the new Legal Name. Once you've received documentation from the IRS confirming the change, move forward with the update. Access the PaymentWorks site at <https://www.paymentworks.com/accounts/login/> and login using your credentials.

1. On the home page, select **"My Payee Profile"** from the menu.
2. Click **"View or Edit Details"** on the lower right corner of the **"Legal Entity Information"** card.
3. Select **"Edit"** to view the details.

PaymentWorks

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My Payee Profile

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Legal Entity Information

Tax Details

Legal Name: Sunny Roofing Inc

Country: US

Tax Identification Number: **-***3879

Tax Class: LLC taxed as C Corporation

✓ Tax Identification Valid



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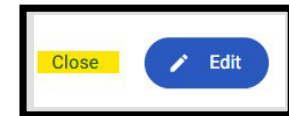
View or Edit Details

3

Close

Edit

4. Update the "**Legal Name**" and "**Company(DBA)***" as needed.
5. Select "**Save**" to finalize and submit the update. Select "**Close**"

A screenshot of the 'Legal Entity Details' form. The form has a title bar with a close 'X' icon. On the left, there are radio buttons for 'Individual', 'Sole Proprietor', and 'Corporation or other complex business entity' (which is selected). Below these is a 'Tax Country' dropdown menu showing 'United States of America'. The main section contains several input fields: 'Legal Name *' (highlighted in yellow), 'DUNS Number', 'Tax Classification *' (a dropdown menu), 'EIN *' (with a masked input '*****'), 'Confirm EIN *' (with a masked input '*****'), and 'UEI Number'. Below the EIN fields is a checkbox labeled 'Does your business use a different name publicly (like a brand name)? This is called a "Doing Business As" (DBA) name.' which is checked. Below this checkbox is the 'Company (DBA) *' field (highlighted in yellow). A large black arrow points from the 'Legal Name' field down to the 'Company (DBA)' field. At the bottom right, there are 'Cancel' and 'Save' buttons (the 'Save' button is highlighted in yellow). Two circular callouts with numbers are present: a '4' in a circle pointing to the 'Legal Name' field, and a '5' in a circle pointing to the 'Save' button.

The IRS validation status is available for your review:

- **Tax Identification Valid** - the "Legal Name" was an accurate match with the IRS database.
- **Tax Identification Pending** - allow time for the verification process to be completed.
- **Invalid** - please review the "Legal Name" to ensure it was entered exactly as it appears on the organizations official IRS documents.

