PaymentWorks– Review Invite Status

After the PaymentWorks registration invite has been sent, you can check the status to validate the progress of the registration. The supplier will receive the invitation via e-mail, then they must create a PaymentWorks account/profile and validate their e-mail. Lastly, they will need to complete the registration.

1. Access the PaymentWorks site and login using your UTEP credentials. From the PaymentWorks home page, select the Vendor Master Updates option.
   The Onboardings table displays the supplier name with the respective registration status. The list contains suppliers invited by you as well as invites sent by other UTEP employees.

2. If you do not immediately see the supplier you are looking for, filter and narrow down results by entering data in the search field.

3. The timeline displayed for each supplier shows the progress of the invitation steps and the registration status.
4. The timeline shows detailed information for each step, including the action taken and a timestamp. Click the hyperlink to see more details about the invitation sent.

For a detailed review of **Steps & Statuses**, continue to the next page.
Statuses by Tracker Circle and Onboarding Step

1st Circle: Invitation Initiation

- **Invitation Initiated** = Initiator sent an invitation.
- **Invitation Rejected** = Invitation was rejected by the initiator’s organization.
- **Invitation Cancelled** = Invitation was cancelled by the initiator or another payer user.

2nd Circle: Invitation Approval

- **Invitation Pending Approval** = Invitation is awaiting approval from another payer user.
- **Invitation Approved & Sent** = Invitation was approved (or does not require approval) by the initiator’s organization and was emailed to the payee.
Statues by Tracker Circle and Onboarding Step

3rd Circle: Invitation Receipt
- Invitation Email Opened: Payee opened the email invitation.
- Invitation Link Clicked: Payee clicked on the link in the email invitation to register with PaymentWorks.
- Email Verified - Invitation Received: Payee set up an account with PaymentWorks and verified their email address.

4th Circle: Registration Submission
- Registration in Progress: Payee began to fill out their registration and has not submitted yet.
- Registration Returned - Pending Resubmission: Payee’s registration was returned for corrections and needs to resubmit for approval.
Statutes by Tracker Circle and Onboarding Step

5th Circle: Registration Approval

- **Registration Submitted - Pending PaymentWorks Review**: Payee completed and submitted their registration form. PaymentWorks is reviewing the payee's banking information.
- **Registration Submitted - Pending Payee Response**: Payee completed and submitted their registration form. PaymentWorks called the payee and left a message, and the payee needs to return the phone call.
- **Registration Submitted - Pending Internal Review**: Payee completed and submitted their registration form and is in queue to be reviewed internally by UTEP.
- **Registration Resubmitted - Pending PaymentWorks Review**: Payee completed and resubmitted their registration form. PaymentWorks is reviewing the payee's banking information.
- **Registration Resubmitted - Pending Payee Response**: Payee completed and resubmitted their registration form. PaymentWorks called the payee and left a message, and the payee needs to return the phone call.
- **Registration Resubmitted - Pending Internal Review**: Payee completed and resubmitted their registration form and is in queue to be reviewed internally by UTEP.
- **Registration Rejected**: New vendor registration form was reviewed and rejected by UTEP.
- **Registration Approved**: New vendor registration form was reviewed and approved by UTEP.

6th Circle: Onboarding Completion

- **Registration Processed**: Information from the new vendor registration form was exported for integration into PeopleSoft.
- **Onboarding Complete**: Payee has connected (linked) their profile in PeopleSoft and was assigned a vendor number.