

Tip Sheet for Payment Works Registration: Clinical Research Participants

PaymentWorks is a financial system at UVA. The clinical research study you are participating in uses this system to provide your payment.

You **must** have an email address to register in PaymentWorks.

You **must** provide the information below to complete registration:

- Full Name
- Phone Number
- Primary Mailing Address
- Social Security Number
- Remittance or Payment Address

****If you would like to be paid by **check**, this is all the information you will need for registration.**

If you would like your payment to **automatically deposited** (ACH) into your bank account, you will need to also enter this information below:

- Bank Name
- Name on Account
- Account Number
- Account Type (Checking, Savings)
- Routing Number
- Email address for payment notifications
- Bank Address (should be on any paper or electronic bank statements)

You must **upload one** of the following (PDF file format):

- Letter on company letterhead
- Voided Check
- Voided Deposit Slip
- Letter from your bank
- Copy of bank statement

Diagram illustrating the structure of a check number and routing information:

YOUR NAME
1234 Main Street
Anywhere, OH 00000

DATE _____

PAY TO THE ORDER OF _____ \$ _____

_____ DOLLARS

044072324 000123456789 123

ROUTING NUMBER ACCOUNT NUMBER CHECK NUMBER

Diagram illustrating a voided check:

John Doe
123 Main St
Anywhere US 10111

Date _____

PAY TO THE ORDER OF _____ \$ _____

_____ DOLLARS

Your Bank
456 Main St
Anywhere US 10111

MEMO _____

1: 123456789 1: 100100239 1: 1234

VOID

About.com

Only fill in the sections marked with a **red asterisk ***, the other sections can be left blank.

If you have specific questions regarding the amount or when you will be paid, please contact your clinical research team.

Complete Payment Works Account Creation and Registration Steps for Clinical Research Participants

Step 1: Creating Your Payment Works Account

You will receive an email from “invitations@paymentworks.com”.



Dear Participant Name:

Initiator has invited you to register as a new vendor to University of Virginia (Test).

In order for University of Virginia (Test) to establish you or your company as a payee or vendor, please [click here](#) to register on PaymentWorks, University of Virginia (Test)'s supplier portal.

Before you begin the registration process, be sure to have the following information available:

1. A valid tax ID (either an EIN or SSN)
2. If you wish to receive electronic (ACH) payments, you will need a copy of a voided check or bank statement.

The next screen you see should look like this:

Please note - If you already have a PaymentWorks account, **DO NOT** create a new one.



To create a new account:

**** Enter your name, phone number, **email address**, and create a password. You will need this **password** so make sure you remember it! ****

When you are creating your account and registering, only fill in the sections with a **red asterisk ***.

Payees (Suppliers)

Join PaymentWorks for Free

Your Information

John Herschel	Glenn Jr.
---------------	-----------

Company Name / Doing Business As (optional)

Title

15404338473

uvapw2019+johnglenn@gmail.com

uvapw2019+johnglenn@gmail.com

Create Password

☒ I agree to the Terms of Service

Join Now

Step 2: Verifying Your Payment Works Account

You will receive another email from this email address: do-not-reply@paymentworks.com

Verify your account by clicking on the link in the email (see below).

PaymentWorks Account Registration Inbox x

PaymentWorks <do-not-reply@paymentworks.com>
to uvapw2019+glenn

Thanks for registering!

Verify your email within the next 72 hours to activate your account, and then sign in to complete your registration.

[Verify Your Email and Complete Your Registration](#)

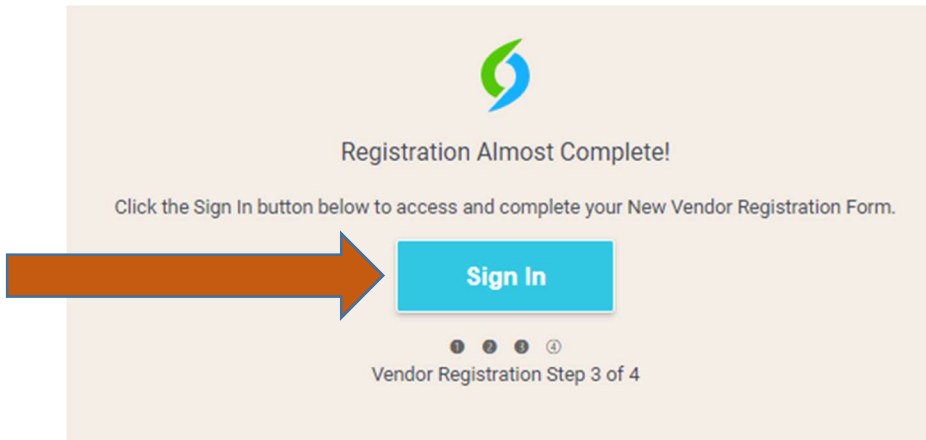
Thank you,
PaymentWorks

PaymentWorks

If this was sent to you in error, please ignore this email and your address will be removed from our records.

You are NOT done yet! A few more steps to complete registration.

Step 3: Complete Your Registration



Use the same email and password you entered for **Step 1** when you created your account.

You will see a screen that welcomes you as a new “Vendor” at the University of Virginia.

Fill out only the sections with a **red asterisk ***

Tax Information

All fields marked with a red asterisk (*) are required fields.
All other fields are optional.

For tax purposes, which best describes you? *

- ☒ Individual, Sole Proprietorship, or Single-member LLC
- ☐ Corporation or other complex business entity

Country of Citizenship *

(Country of Incorporation if using EIN)

United States ▼

Are you using an SSN or EIN? *

- ☒ SSN
- ☐ EIN

Legal First Name *

John ✓

Legal Last Name *

Glenn ✓

SSN *

9 digits, no dashes or spaces

226987536 ✓

The next few screens are regarding **US W-9 Tax Withholding**.

Generate Electronic W-9 * When you use PaymentWorks, we will create an IRS form W-9 for you automatically, unless you opt out. Electronic W-9's are convenient for you and provide enhanced security for your information. You may wish to opt-out of electronic W-9 generation if you have any exemptions (Section 4) or specific signature requirements (see instructions on page 4 and 5 of the W-9). ☒ Yes ☐ No Form W-9 Certifications You have chosen to submit your Form W-9 electronically. Please confirm the following certifications: Tax ID Type ☒ The Tax ID number shown on this form is my correct taxpayer identification number Backup Withholding ☒ I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding. Citizenship ☒ I am a U.S. citizen or other U.S. person	Certification Instructions You must uncheck item 2 ("Backup Withholding") above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II on page 3 of the IRS form W-9 DUNS if applicable The DUNS field <u>does not</u> apply to research participants, so leave this blank.
---	--

1.

Enter a Primary Mailing Address.

This will be your home address.

Country*
United States ▼

Street 1*
987 FIFTH AVENUE ✓

Street 2
✓

City*
NEW YORK ✓

State*
New York ▼

Zip / Postal Code*
10075 ✓

2.

Enter a **Remittance or Payment address**. Either click the box next to Same as Primary Address or enter a different address.

☐ Same as Primary Address

Country*
United States ▼

Street 1*

Street 2

City*

State*
Select a State ▼

Zip / Postal Code*

3.

UVA's registration requires a Primary Order Address. If you are an individual getting paid for research, this will be the same as your home address, you can click the box next to Same as Remittance Address.

☐ Same as Remittance Address

Country*
United States ▼

Street 1*

Street 2

City*

State*
Select a State ▼

Zip / Postal Code*

Please select if you are a US citizen or Foreign Individual.

Note: If you are a foreign individual with a US tax number, please select US Individual.

Payee Category*

Choose One ▼

Choose One

US Individual

Foreign Individual

If you are NOT a UVA fellow or student, you will select **NO** for the questions below. Select **Yes** only if you are a UVA fellow or if you are a UVA student.

Are you a UVA Fellow*

If you are a student enrolled at UVA, you will need to enter your student ID number. (This will be 9 digits.)

Are you currently enrolled at UVA as a student?*

Student ID number*

If you want your payment to be deposited directly into your account, you will select **ACH**.

Select **Check**, if you want a *physical check* mailed to you.

Payee Bank Location*

Please indicate whether you will be using a US bank account or a foreign bank account to deposit your payment.

Payment Method for Payees with a US Bank*

ACH payments are made immediately, while Checks take longer to process and mail.

ACH	▼
Choose One	
ACH	
Check	

Next you will need your bank name, account number, routing number, account type (checking, savings).

You do not need to enter a check number.

Diagram of a check with fields for routing, account, and check numbers highlighted. The check includes fields for YOUR NAME, 1234 Main Street, Anywhere, OH 00000, DATE, PAY TO THE ORDER OF, \$, and DOLLARS. The MICR line at the bottom is divided into three sections: ROUTING NUMBER (044072324), ACCOUNT NUMBER (000123456789), and CHECK NUMBER (123).

In this next step you need to upload a voided check, voided deposit slip, or copy of account statement. These are the most common. You will also enter the address of your bank.

Bank Validation File *

An image or PDF file can be used here containing one of the following:

- Letter on company letterhead
- Voided check
- Voided deposit slip
- Letter from your bank
- Copy of a bank account statement

Choose File

No file chosen

Email Address for Payment Notifications *

Bank Authorization *

Customers using PaymentWorks and the financial institution named herein are authorized to automatically deposit monies to my account

☐

I Agree

Country *

United States

Street 1 *

Street 2

City *

State *

Select a State

Zip / Postal Code *

After you have entered your information you will click the [Submit](#) button.

If you accidentally skipped over a section, you will get an error message, scroll up the registration – the missing information will be in **red**.

If you were not able to fill in all the sections with a **red asterisk***, you will click on [Save and Exit](#). Once you have the rest of the information you need you, you can sign back in to Payment Works and complete your registration.

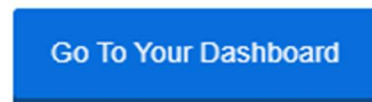


Submission Successful!

Your new vendor registration has been submitted successfully to University of Virginia (Dev).

You will receive an email notification when your application has been approved.

Please note - this is not an authorization to perform services.



Check your email for the notification that your account and registration are approved.

If you have any questions reach out to your clinical research team.