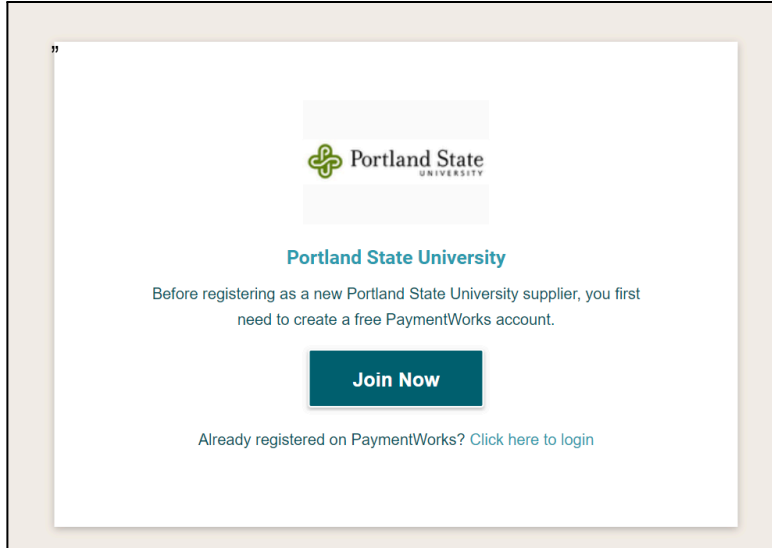




PaymentWorks Registration How To

Oregon Center for Career Development

OCCD Incentive and Recognition Payments require individuals to create a PaymentWorks account with Portland State University. This secure and confidential account will require personal information to meet Internal Revenue Service requirements. Each of these steps is outlined below, with instructions, and displaying a screenshot for a visual to follow.

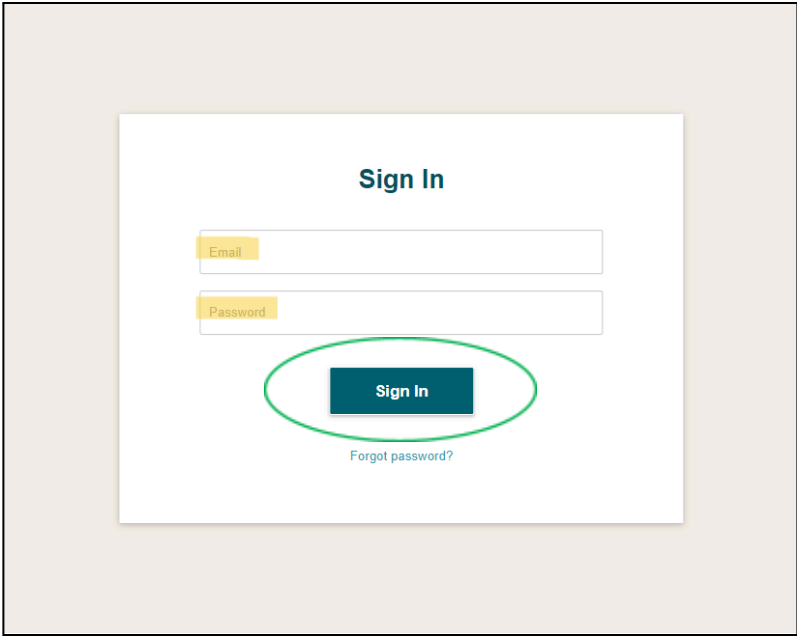


STEP 1: Click the link in the email you were sent to register your account, then click “Join Now”

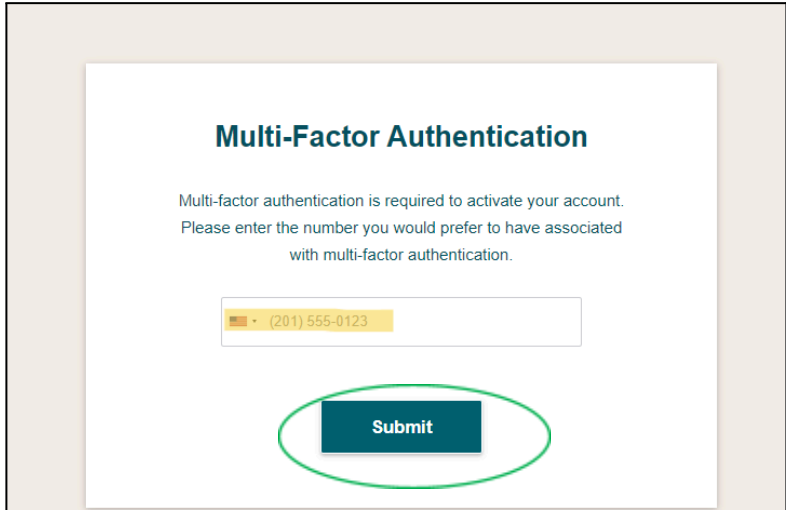
STEP 2: Fill in “Your Information” and “Create Password” and click the agreement and then click “Join Now”.

After you click “Join Now” you will be directed back to your email to activate your account.

Questions



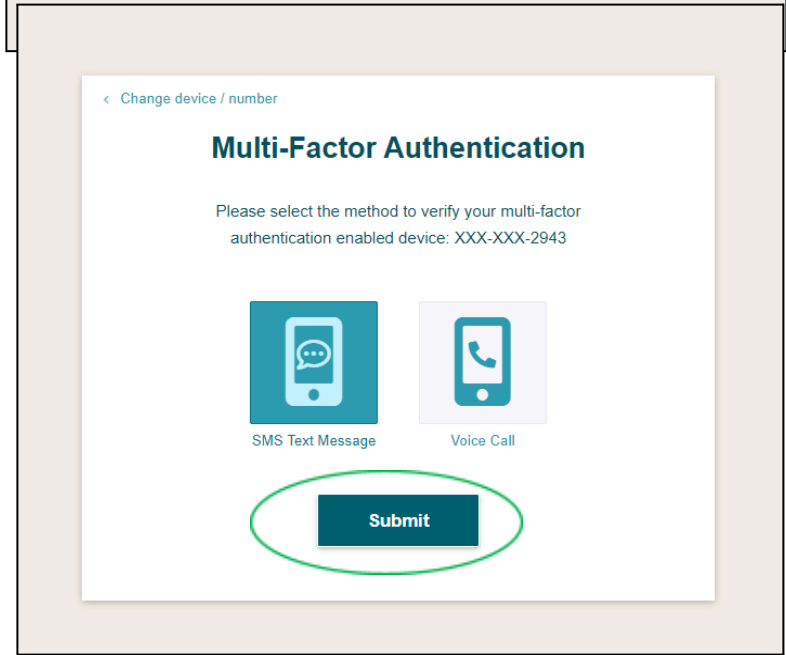
STEP 3: After you get the activation email click on that to sign in with your email and chosen password. Then click “Sign In”.



STEP 4: To ensure that your information is protected PaymentWorks requires multi-factor authentication.


Enter a phone number (does not have to be a cell phone) and click “Submit” and then choose if you want to receive a text or a voice call.

Then click “Submit”.



[Change contact method](#)

Multi-Factor Authentication



An authentication code from PWAUTH has been sent to XXX-XXX-2943.


Authentication Code

Submit [Resend code](#)

Step 5: Enter the code that you received by either text or a call and then click “Submit”

PaymentWorks [Logout](#)

[Welcome](#) [Tax Information](#) [Addresses](#) [Additional Information](#)



Portland State University
New Vendor Registration

Welcome, Sam Morelli!

In order to onboard as a new vendor, you will have to fill out and submit the following form to **Portland State University**.

You will be notified by email when your application is processed.

[Save and Exit](#) **Next**

Step 6: You are now in the system!

Go ahead and click “Next”

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)

Select an Option
United States

Are you using an SSN or EIN? *

☐ SSN
☐ EIN

Step 7: You will now fill in your tax information. You will click “Individual” and then choose your “Country of Citizenship” and then pick if you are using a “SSN (social security number)” Or “EIN (employer identification number)”.

Then enter your SSN or EIN.

You are completing this for yourself personally, not as a business.

Questions

Tax Information

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

All other fields are optional.

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

Step 8: By clicking yes you are letting PaymentWorks create a W-9 for you using the information you provided in Step 7.

If you are subject to Backup Withholding (the IRS will have informed you) uncheck this box. If you are not subject to this leave the box checked.

Personal Information

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

All other fields are optional.

Your Full Name* or DBA (doing business as) Business Name*

Enter your full name, or your business name as you would like it to appear on a check or other form of payment made out to you.

Enter Text Here

Preferred Email*

Enter Email Here

Description of Goods or Services

Enter Text Here

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Save and Exit

Next

Step 9: Then fill in your **personal information** for your W-9. You will need to fill in "Your Full Name" and "Preferred Email" then click next

You are filling this out as an **INDIVIDUAL** not as a business.

Description of goods or services can be left blank.

Questions

- Internal Revenue Service at 1-800-829-1040
- OCCD: centerline@pdx.edu or (503) 725-6912 or 877-725-8535

Primary Address

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

Country *
Select an Option
United States

Street 1 *
Enter Text Here

Street 2
Enter Text Here

City *
Enter Text Here

State *
Select an Option

Zip / Postal Code *
Enter Text Here

Remittance Address

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

☒ Same as Primary Address

Step 10: Fill in your “Primary Address”

If you have a different mailing address uncheck “same as primary address” and add in the ‘Remittance Address”

Additional Information

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

Payment Information

Bank Location *
If no bank account, please select where you are located
Select an Option
USA Bank

Domestic Payment Method *
Select an Option
Choose One
ACH/Direct Deposit
Check

Save and Exit

Submit

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Step 11: Under additional information you will enter in your “Bank Location” and then how you would like to receive your payment. You can select either “ACH/Direct Deposit” or “Check”. Then click “Submit”

If you choose ACH/Direct Deposit you will then need to enter your bank account information. You will need your Account Number and Routing Number which you can typically find on a check or your bank can give you that information.

Submission Successful!

Your new vendor registration has been submitted successfully to Portland State University.

As part of your registration process you **may** receive a phone call from PaymentWorks to review information you have submitted.

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

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

[Give Us Your Feedback](#)
[Go to your dashboard](#)

Step 12: If you see this screen then PaymentWorks is done and submitted!

If PaymentWorks has any questions they will reach out by email.

All questions must be resolved by the deadline in order to receive payment.

Questions