Mazlo Resource for Projects Requesting Payments

What do you need to upload for what kind of payment?

Access your funds to request payments for vendors and contractors. This includes facilitators, space use, participant stipends, and independent contractor stipends, whether one-time or recurring. For any uploaded document (agreement, bill, invoice): include total amount owed, explanation of goods/services, and no tax.

ONE-TIME PAYMENTS *Projects do NOT fill out the independent contractor form, but create their own.*				**ONGOING** PAYMENTS *Model A projects submit the independent contractor form* *Model Cs, C+ do not submit the independent contractor form*		
Type	Examples	Upload in Mazlo		Type	Notes	Upload in Mazlo
Vendor payments	One-time payments for facilitators, space rentals, ACH purchases	At least one of the following: **agreement or bill or invoice.**		**Long-term agreement** *FLAT RATE*	One agreement covers recurring payments, such as stipends	**Agreement** set for recurring. Invoice *not required for each payment request, unless there is a change in amount.*
Stipends + contractors	Discrete, one-time payments for project leads and board members	At least one of the following: **Agreement or invoice**		**Long-term agreement** *PER HOUR*	Invoice must show total number of hours worked per payment request	**Agreement** defines hourly rate and scope. An **invoice** needs to be uploaded.

W9 REQUIRED?!
$600! That's the amount where the IRS requires tax paperwork be completed for any individual or "Vendor" paid. Here is a "Blank W9" to upload when you're making payments to anyone with the amount's total, accumulated or through one-time payment, is over $600 annually.

More Notes on Payment Requests

- **Here is the Mazlo training video for that "Request for Payment" feature.**
- For any uploaded document (agreement, bill, invoice): include total amount owed, explanation of goods/services, and no tax. The **agreement or invoice must clearly explain what is being paid for, even if brief.** If this is not clear, the payment request will be delayed.
- Someone can receive both one-time and ongoing payments (i.e., a project lead with a recurring stipend, who also provides a service as a one-time payment.
- Ideally, agreements are signed before services are rendered.
- Once all signatories are complete, and documents are uploaded, project leads create the contact in Mazlo. Every payment request must be tied to a **contact**, which projects create in Mazlo.
- Then, Projects leads request payment and upload the supporting document (**agreement or invoice**).