



**PennState**

# PaymentWorks

**NEW SUPPLIER REGISTRATION**

Research Participant Supplier

Office of Central Procurement  
PSUsuppliers@psu.edu

**SUMMARY**

This document is used to provide examples and guidance for some of the questions that research participants will see as they progress through the registration process.

This captures most of the required questions, indicated on the form by a red asterisk (\*).

If at any time you need to exit the application, you may hit Save and Exit at the bottom of the page. Once ready to complete the application, you may resume where you left off.

***General Help:***

For assistance with registering, please visit the General Help link below or contact [psusuppliers@psu.edu](mailto:psusuppliers@psu.edu).

<https://community.paymentworks.com/payees/s/topic/0TO3k000001uFcNGAU/completing-your-registration>

***Submitting a Support Ticket:***

For technical assistance, please submit a Support Ticket with Payment Works.

<https://community.paymentworks.com/payees/s/contactsupport>

**Getting Started:**

To register as a research participant, you will need to select Individual, Sole Proprietorship, or Single-Member LLC. Then select SSN to register.

You may opt to have Payment Works generate a W-9 on your behalf or you may upload your own completed W-9. If you choose to have the W-9 generated on your behalf, be sure to review the backup withholding message.

**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

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.

## Enter your personal information.

## 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.

## Telephone Number \*

## Preferred Email \*

## Website

## Description of Goods or Services

## Enter your primary address.

## Primary Address

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

## Country \*

## Street 1 \*

## Street 2

## City \*

## State \*

## Zip / Postal Code \*

Enter your remittance address. This is the location where a check payment will be sent if that is the payment method you choose. If the payment location is the same as your primary location, you may select the box that says "Same as Primary Address."

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**Remittance Address**

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

Same as Primary Address

Country\*  
United States ▼

Street 1\*

Street 2

City\*

State\*  
Select a State ▼

Zip / Postal Code\*

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For the Supplier Category question, you will select US Individual.

After selecting US individual, you will need to choose the Research Participant selection.

#### Additional Information

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

Please choose a selection that best applies to you\*

If you would like to change the above Supplier Category Question to US or International Entity, please revise this question to show the option as "Choose One."

If at any point an individual is classified as an employee to be paid via Payroll Services, they will be prompted to not proceed with the online enrollment. If that happens, they should contact psusuppliers@psu.edu for further direction

Choose One ▼

- Choose One
- US Research Participant Choice**
- US Honorarium/Guest Lecturer
- US Lion Cash
- US None of these apply

For 1099 reasons, please disclose if you will be receiving a payment for any of the following options.

#### Additional Information

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

All other fields are optional.

#### 1099 Tax Information for Individuals

Are you being paid for any of the following?\*

- Royalties or broker payments in lieu of dividends or tax-exempt interest
- Rents
- Services performed by someone who is not your employee
- Prizes and awards
- Other income payments
- Medical and healthcare payments
- Crop insurance proceeds
- Cash payments for fish (or other aquatic life) you purchase from anyone engaged in the trade or business of catching fish
- Cash paid from a notional principal contract to an individual or partnership or estate
- Payments to an attorney
- Any fishing boat proceeds
- Nonemployee compensation (self-employment income)
- None of these statements are true

Answer the below questions as “yes” or “no”

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

All other fields are optional.

Are you or are you aware of anyone at your organization this is a current or past employee in the University Payroll System?\*

Are you or are you aware of anyone at your organization that was on record as an employee of the University any time during the last twelve months?\*

 This field is required

To the best of your knowledge, will the University hire this individual as an employee immediately following the termination of this service?\*

Do you, or does anyone at your organization know if they will provide the same or similar services while an employee?\*

To the best of your knowledge, is the individual a Guest Lecturer who lectures at only a few sessions for a week or less during the calendar year?\*

Do you know if they will they be teaching more than a week?\*

Are you, or is anyone at your organization aware if the individual will provide the same or similar services to other entities or to the general public as part of a trade or business?\*

(e.g. had Federal ID#, letterhead, invoices, advertising, etc.)

Are you or is anyone at your organization aware if the University will provide the specific instructions regarding the performance of the required work rather than rely on the individual's expertise?\*

Answer the below question as “yes” or “no”

#### Additional Information

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

All other fields are optional.

Will the University set the number of hours and/or days of the week that the individual is required to work, as opposed to allowing the individual to set own work schedule?\*

You will then be asked to enter your payment information.

#### Payment Information

Bank Location\*

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

- Choose One
- US Bank
- International Bank

US bank accounts can be paid via Wire, Direct Deposit (ACH) or check. If you would like to be paid electronically, you will be asked to enter your banking information.

#### Banking Information

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

All other fields are optional.

Bank Name\*

Name on Account\*

Account Number\*

Confirm Account Number\*



You will then continue to enter your banking details.

### Banking Information

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

All other fields are optional.

Account Type \*

Select Account Type



Routing Number \*

SWIFT Code

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

Lastly, list your bank's address.

### Bank Address

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

All other fields are optional.

Country \*

United States



Street 1 \*

Street 2

City \*

State \*

Select a State



Zip / Postal Code \*

Once completed, you may hit Submit to have your application reviewed.

Submit

***Thank You for choosing to become a supplier  
with Penn State University!***