PaymentWorks Invitation & Registration Status Quick Guide

You can monitor the status of the invitation & registration directly in the portal.

Invitation Status:
- **Pending Approval** – All invitations are pending Purchasing’s approval before the link is released to the vendor.
- **Delivered** – The invitation & link to the portal were delivered to the vendor.
- **Opened** – The vendor has opened the email inviting them to register but has not taken any action.
- **Clicked** – The vendor has clicked the link to the portal.
- **Rejected** – Purchasing has rejected the invitation & emailed the initiator the reason. You may also expand the invitation which indicates the reason for the rejection.
- **Undeliverable** – The email address on the invitation is incorrect. The initiator can click undeliverable to expand the invitation and resend to a new email.

Vendor Account Status:
- **No Account** – The vendor has not created their username and password to the portal.
- **Email Validated** – The vendor created a username and password to access the portal.
- **Registered** – The vendor used their invite to create their account but has not activated their account.

New Vendor Registration Status:
- **Not Started** – The vendor has not started their BGSU registration form.
- **In Progress** – The vendor is in the process of completing their BGSU registration form.
- **Submitted Pending PaymentWorks review** – The vendor has completed and submitted their registration form. PaymentWorks is now in the process of reviewing the vendor’s banking information.
- **Submitted PaymentWorks Waiting for Vendor Response** – The vendor has completed and submitted their registration form. PaymentWorks has called the vendor and left a message, and the vendor needs to return the phone call.
- **Submitted Pending Internal Review** – The vendor has completed and submitted their registration form. PaymentWorks has reviewed the bank account and the registration is now routing through the BGSU internal review process. You can click on “Submitted – Pending Internal Review” to view their registration. This will show you who the registration is pending with for approval.
- **Returned** – PaymentWorks or Purchasing has returned the registration for requirements or changes and the vendor has not taken action. Departments do not have the capability to view the returned message. Please open the registration and scroll to the bottom to view the comments from Purchasing for the reason for the return.
- **Rejected** – The registration form was rejected. Please open the registration and scroll to the bottom to view the comments for the rejection. If there are not any comments, please contact Purchasing to inquire about the rejection.
• **Complete** – The vendor’s information has been connected in our system and been assigned a vendor number. You can submit your Payment Request or Non-Catalog request for a PO to be issued.

### Submitted registration approval workflow:

You can also monitor the BGSU approval workflow after a registration has been submitted directly in the portal. If you are on the onboarding section, click “submitted” under the new vendor registration status. This will take you to the requests tab to monitor the workflow of the registration and show the pending approver.

- **Bank Validation Group** – The registration is being reviewed by the PaymentWorks team for their validation process.
- **FRR Check Approval Group** – The registration is being reviewed by the PaymentWorks team for their validation process.
- **Sanctions List** – The registration is being reviewed by the PaymentWorks team for their validation process.
- **Vendor Screener (individual/sole proprietor or single member company only)** – The registration is being reviewed by Purchasing for the proper documentation.
- **HR (individual/sole proprietor or single member company only)** – The registration is being reviewed by the HR Department.
- **Controller (individual/sole proprietor or single member company only)** – The registration is being reviewed by the Controller.
- **Vendor Approver** – The registration is being reviewed by Purchasing once all approvals have been completed to load the data into the BGSU system.
- **Processed/Connected** - The vendor’s information has been connected in our system and been assigned a vendor number. You can submit your Payment Request or Non-Catalog request for a PO to be issued.