PAYMENTWORKS GUIDE

Setups & Account Maintenance

Last Update: 08/26/2026

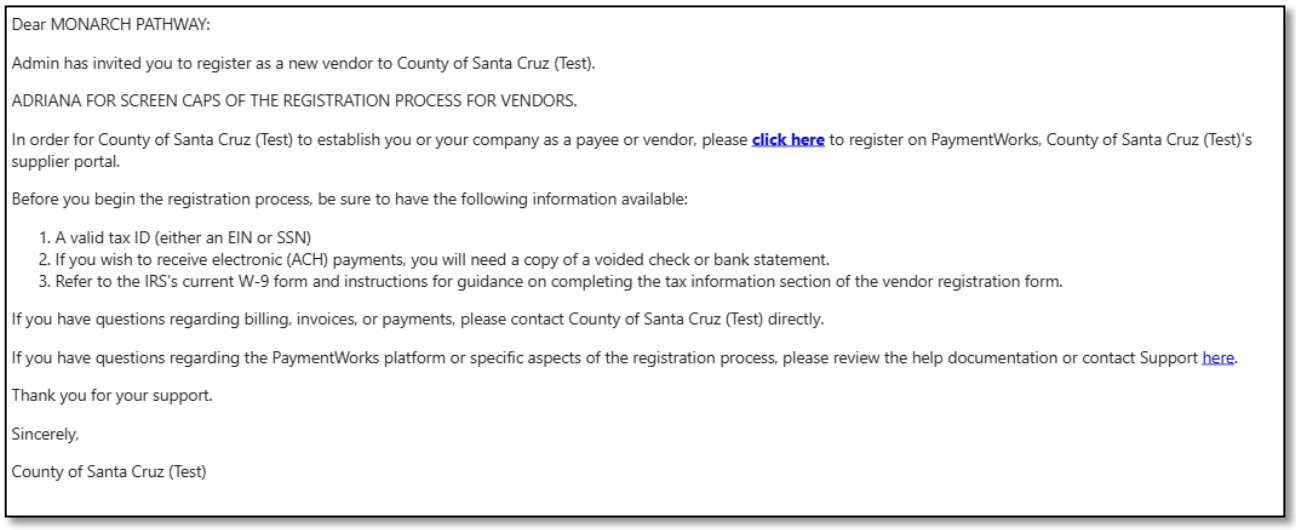
Adriana Goericke
Sheriff.Fiscal@santacruzcountyca.gov

Contents

Step 1 - New Vendor Registration

Use the following steps to register as a new vendor in PaymentWorks and submit your information for County payment setups.

Upon completing the Vendor Intake Form for the County of Santa Cruz, you will receive an email from PaymentWorks like this:



Dear MONARCH PATHWAY:

Admin has invited you to register as a new vendor to County of Santa Cruz (Test).

ADRIANA FOR SCREEN CAPS OF THE REGISTRATION PROCESS FOR VENDORS.

In order for County of Santa Cruz (Test) to establish you or your company as a payee or vendor, please **click here** to register on PaymentWorks, County of Santa Cruz (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.
3. Refer to the IRS's current W-9 form and instructions for guidance on completing the tax information section of the vendor registration form.

If you have questions regarding billing, invoices, or payments, please contact County of Santa Cruz (Test) directly.

If you have questions regarding the PaymentWorks platform or specific aspects of the registration process, please review the help documentation or contact Support here.

Thank you for your support.

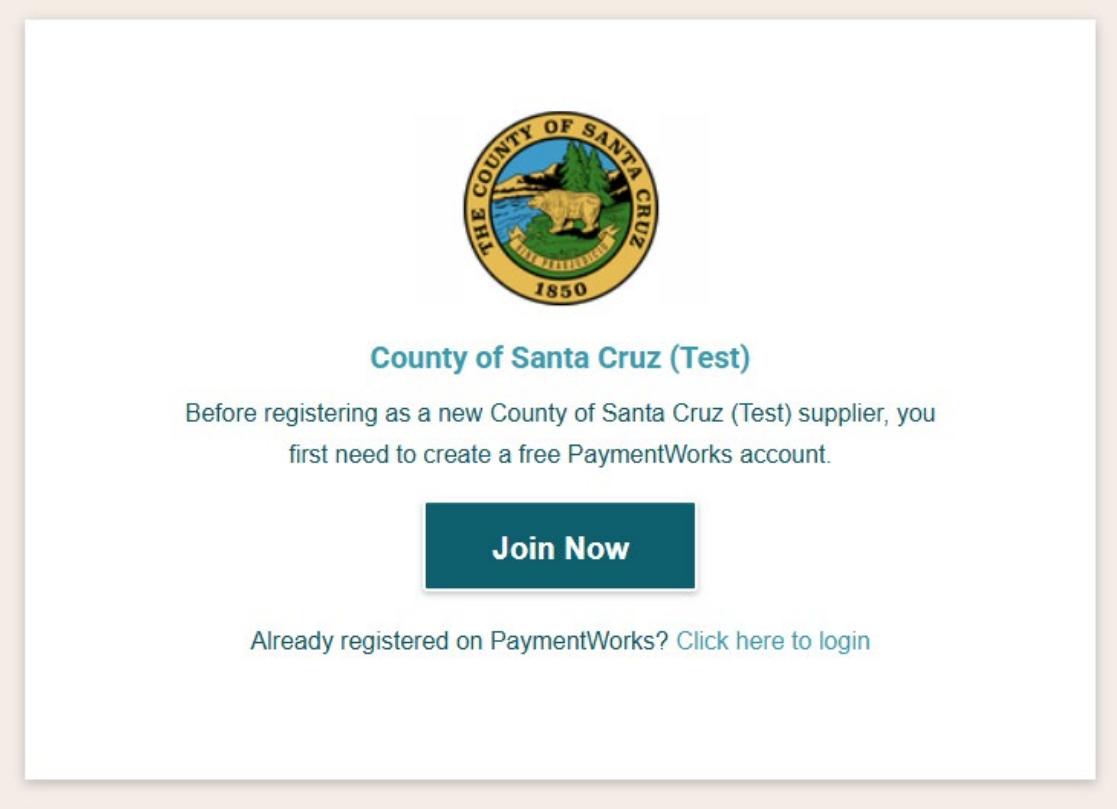
Sincerely,

County of Santa Cruz (Test)

Note the information requirements in the email. To save time, gather these documents in advance of clicking the PaymentWorks link.

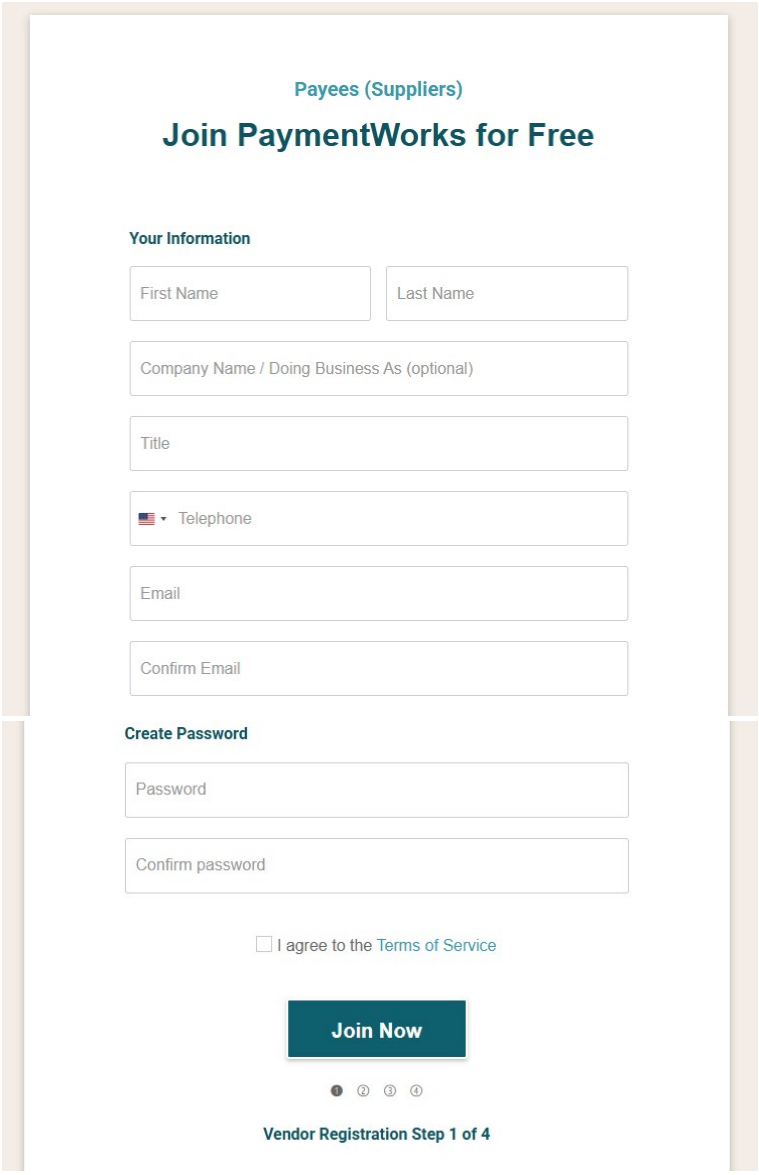
Step 2 – Access PaymentWorks

- Open the PaymentWorks link provided by the County in the email.
- **If you already have a PaymentWorks account**, sign in by selecting "Click here to login", shown in the screenshot below.
- If you do not have an account, select **Create Account** and complete the registration process.



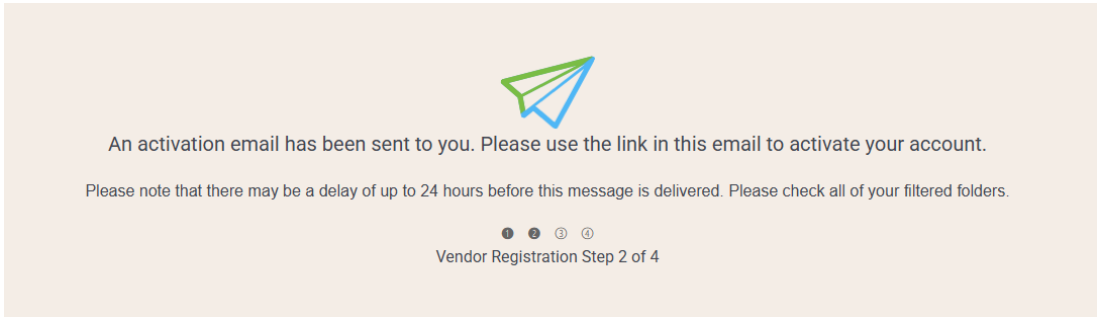
Enter your contact information:

- Enter your name and phone number.
- Enter your legal business name.
- Enter your business email address. **Make sure the email address is accurate**, as PaymentWorks will send an invitation to complete the registration.



The password must be at least 8 characters long and contain at least 2 digits

After you click “Join Now”, check your email.



Step 3 – Verify Your Email Address

PaymentWorks will send an invitation to complete the registration.

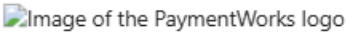
From: **PaymentWorks** <do-not-reply@paymentworks.com>
Date: Tue, Aug 25, 2026, 10:14 AM
Subject: PaymentWorks Account Registration
To: <monarchpathway@gmail.com>

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

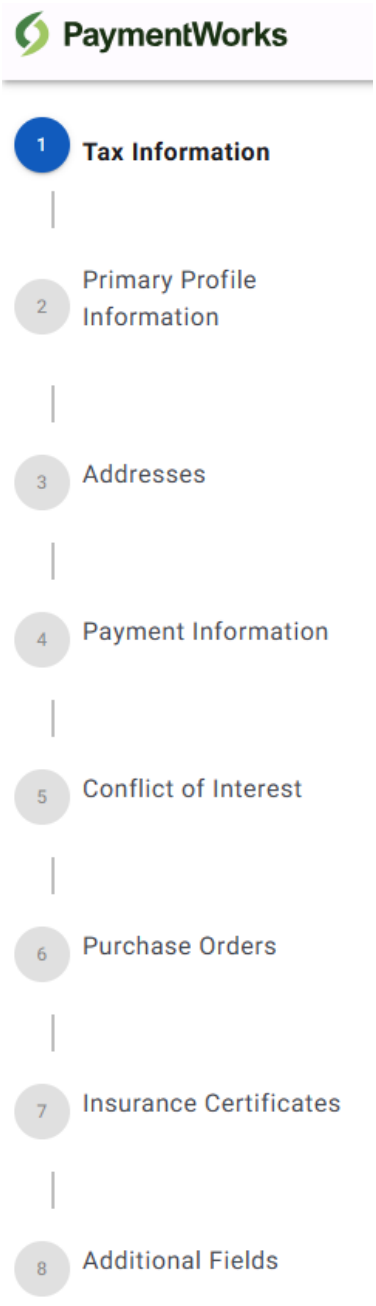
Thank you,
PaymentWorks



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

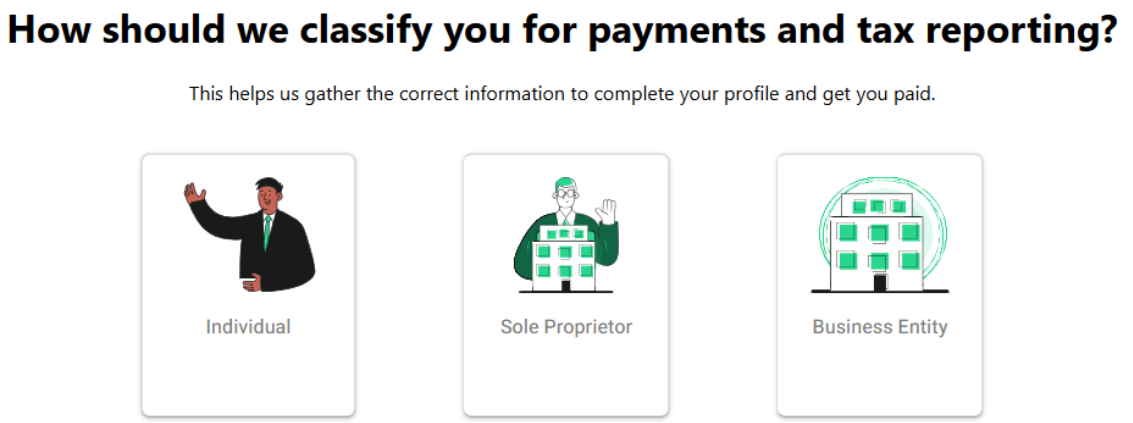
Step 4 – Enter Vendor Information in PaymentWorks

- Enter the requested vendor information.
- Verify all information before continuing. Use the back button to go back to previous pages.
- All the required information categories are listed on the left of the screen:



SECTION 1: TAX INFORMATION

Select the tax reporting profile that best describes your business



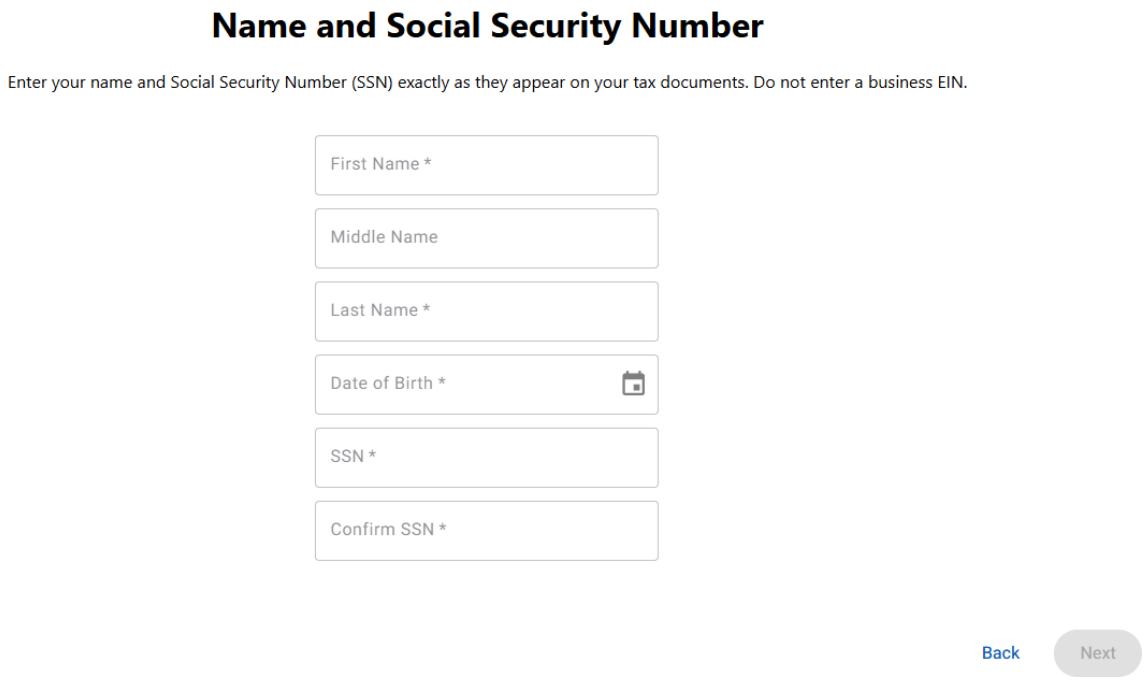
Links to instructions specific to your selection:

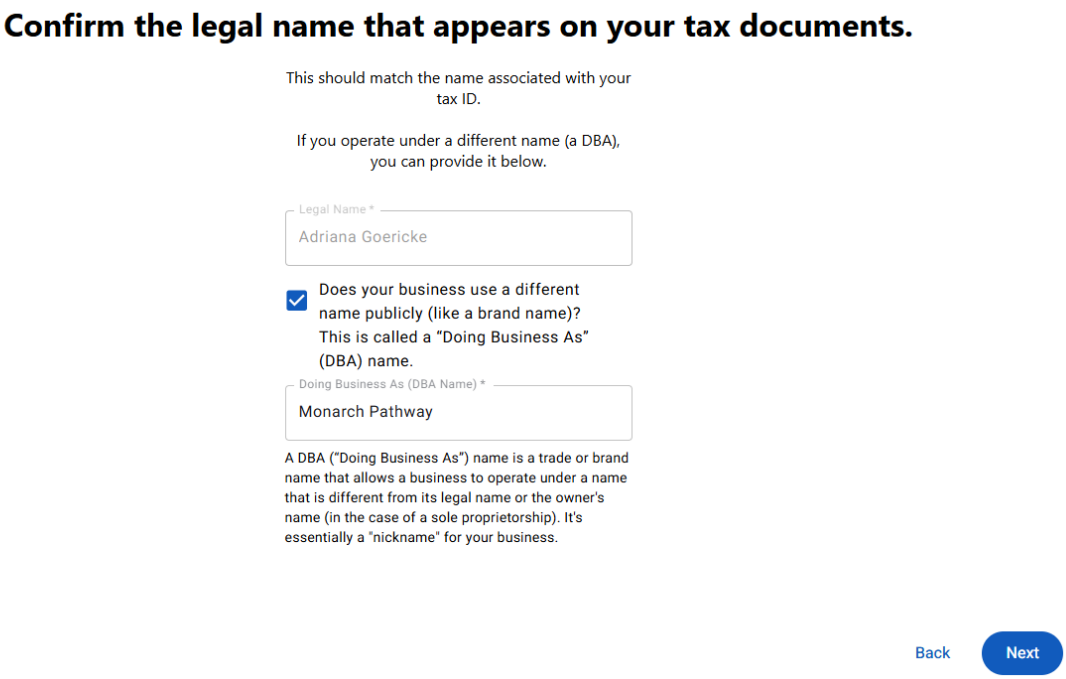
- Individual
- Sole Proprietor
- Business Entity

Individual

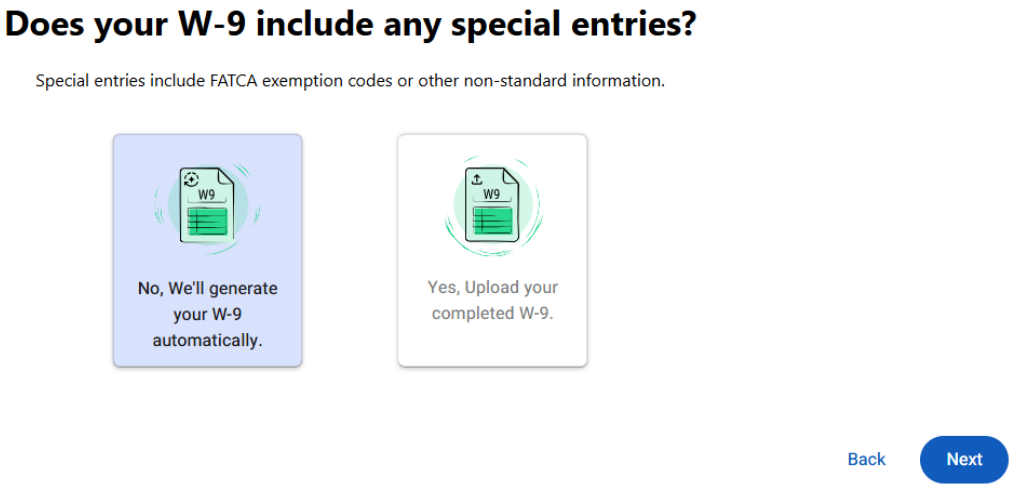
If you click **Individual**, you will be asked to verify

- Which country you pay taxes in
- Your social security number
- Your legal name as it appears on tax records

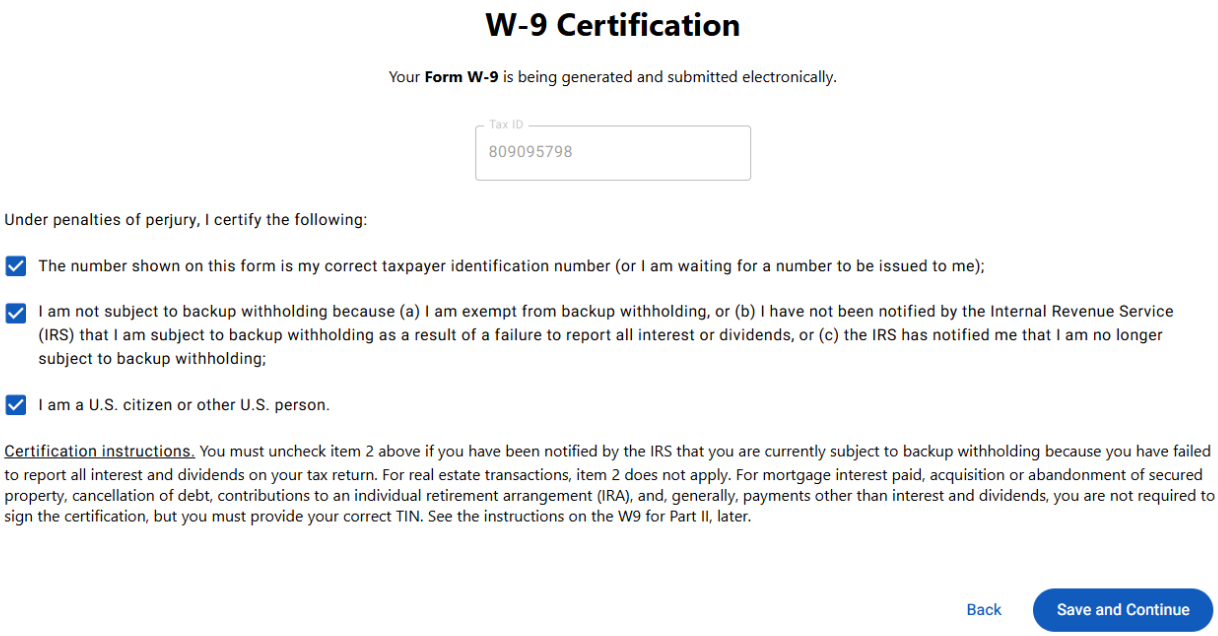




After this information has been entered, you can either upload your W-9 or PaymentWorks will generate one for you.

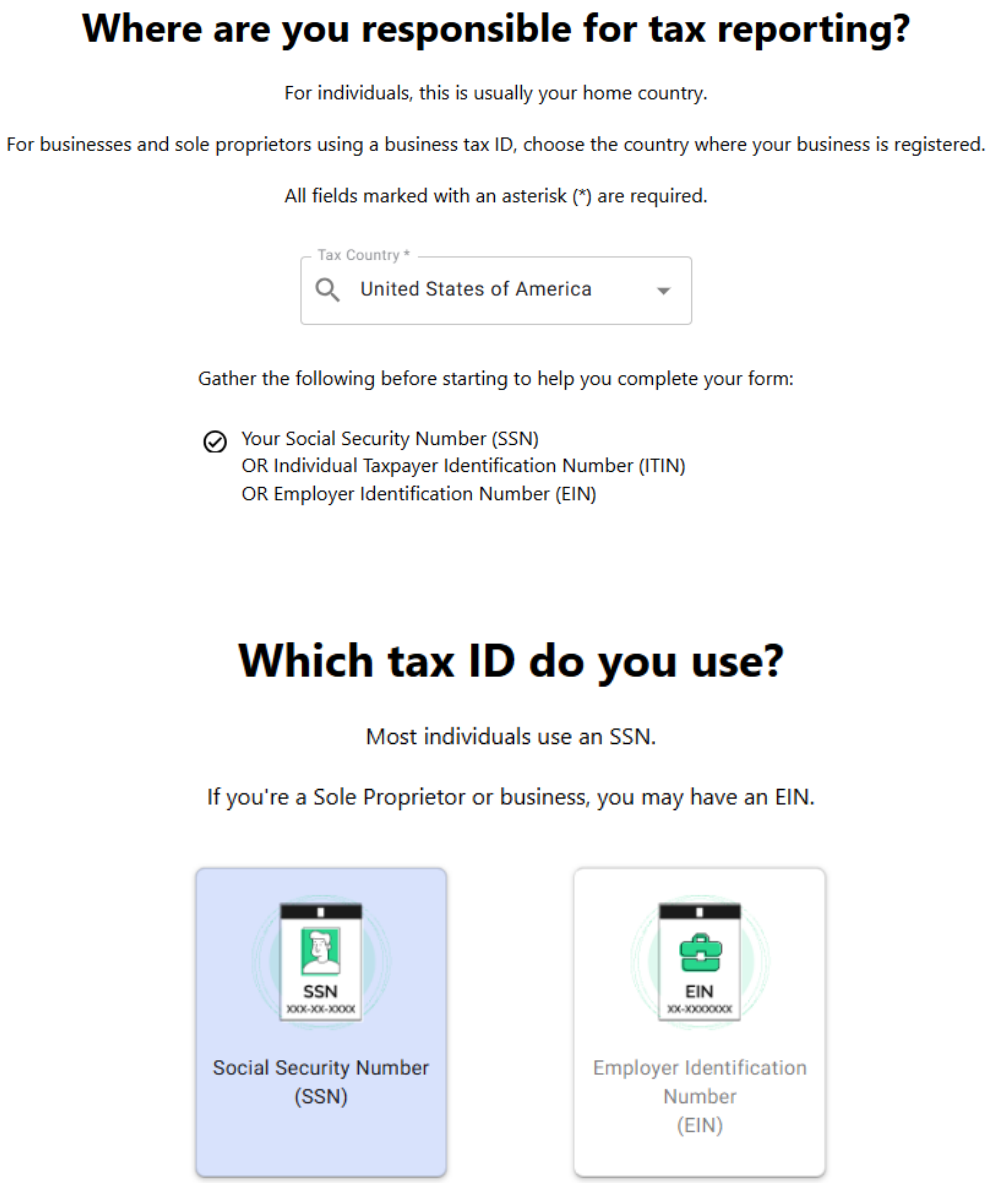


You will then be asked to certify your W-9:



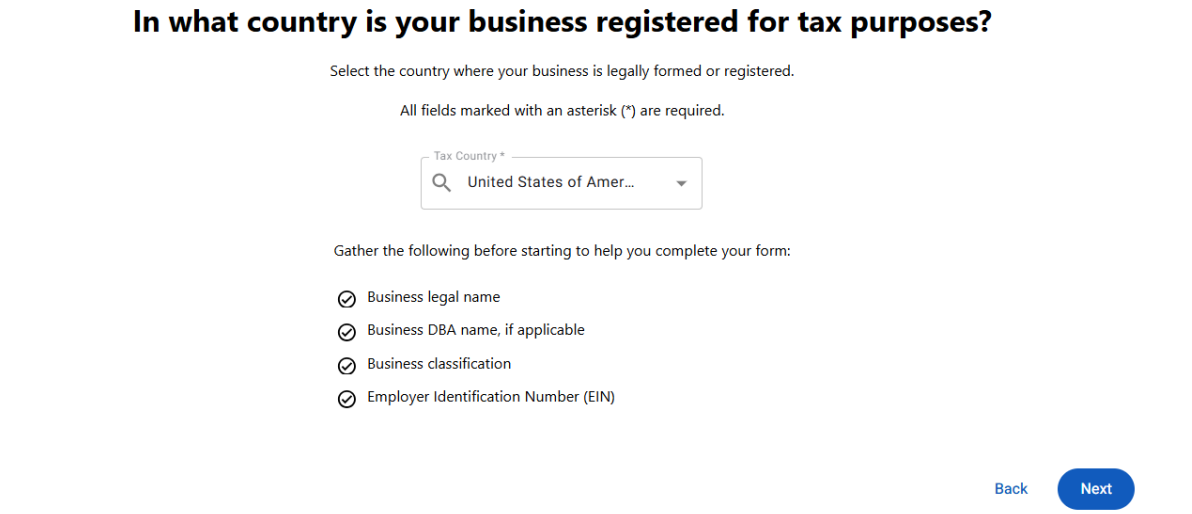
Sole Proprietor

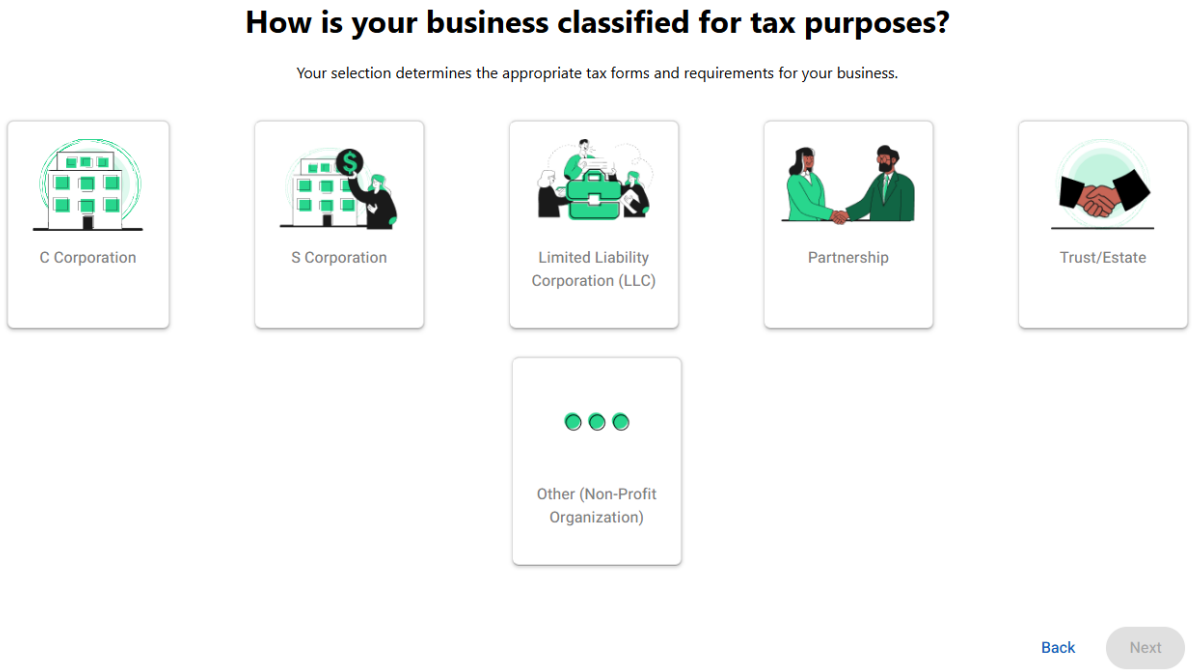
If you select Sole Proprietor, you'll be asked provide your SSN, Taxpayer ID Number, or EIN:



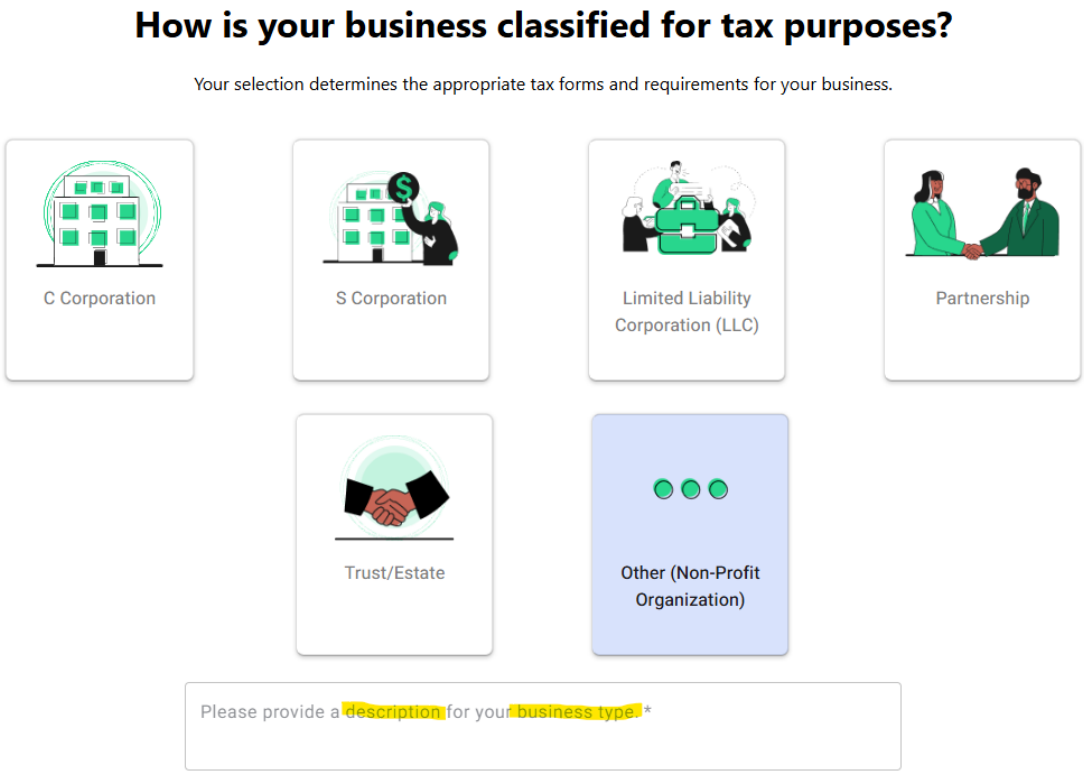
Business Entity

If you select Business Entity, you will be asked for your business legal name, the DBA, business classification and your EIN.

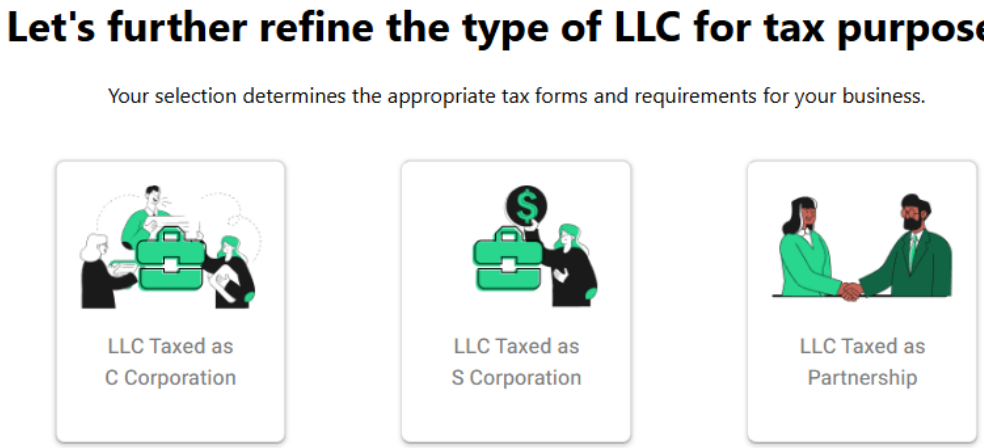




If none of the types fit your business, select other and specify.



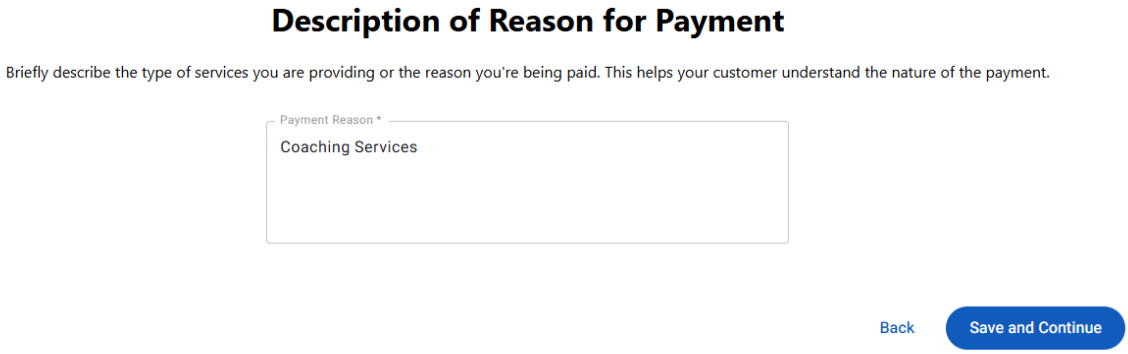
If you select **Limited Liability Corporation (LLC),** you will be prompted to select from a menu of options:

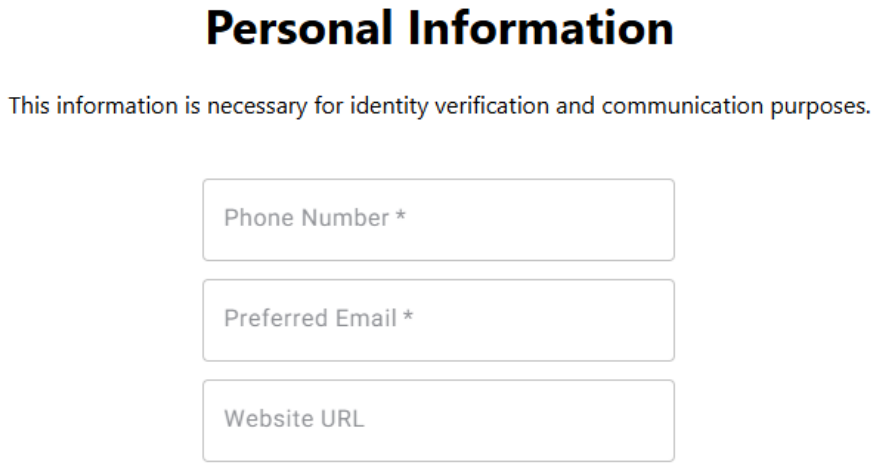


Complete all necessary information for your business entity based on your selection.

SECTION 2: PRIMARY PROFILE INFORMATION

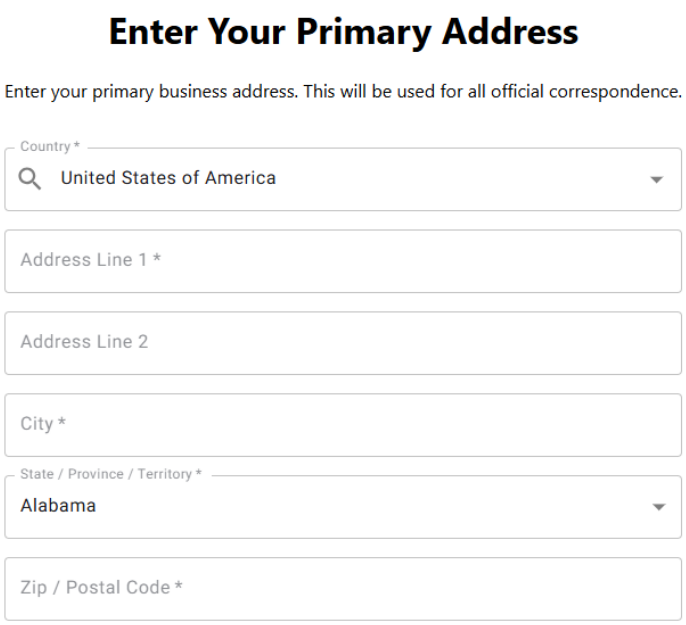
Enter the type of services you provide and your personal information.



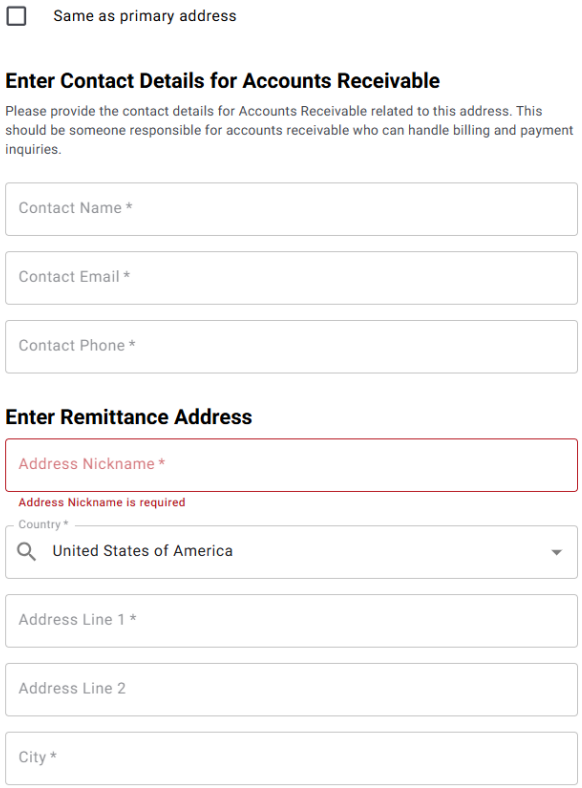


SECTION 3: ADDRESSES

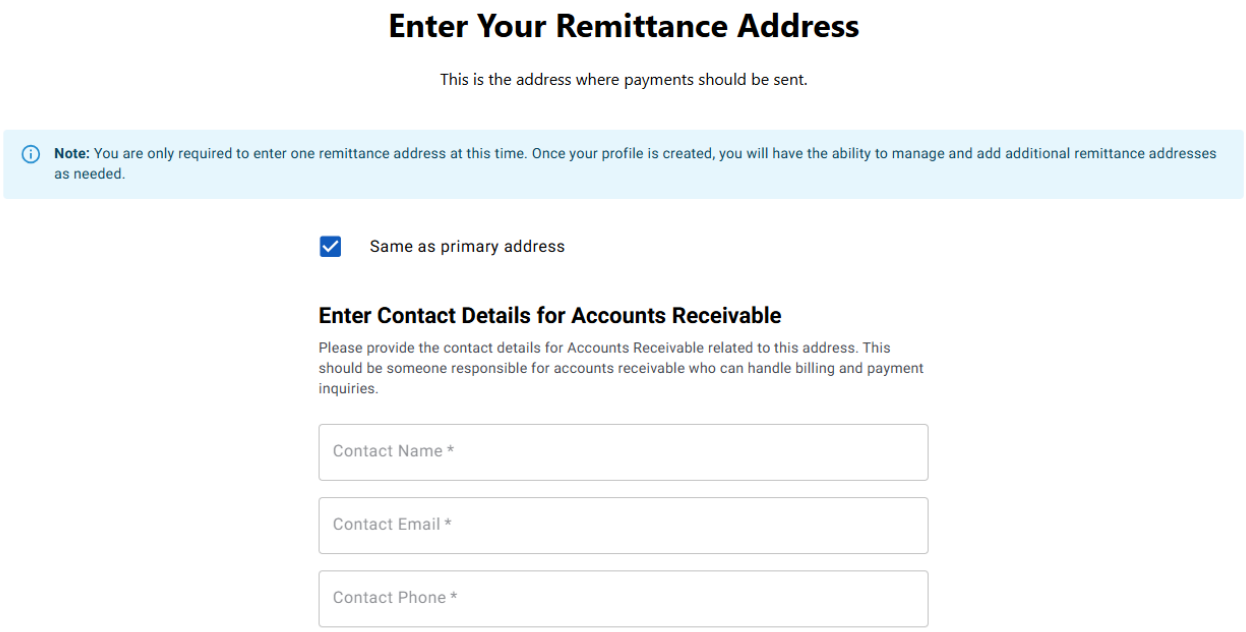
Enter your primary address



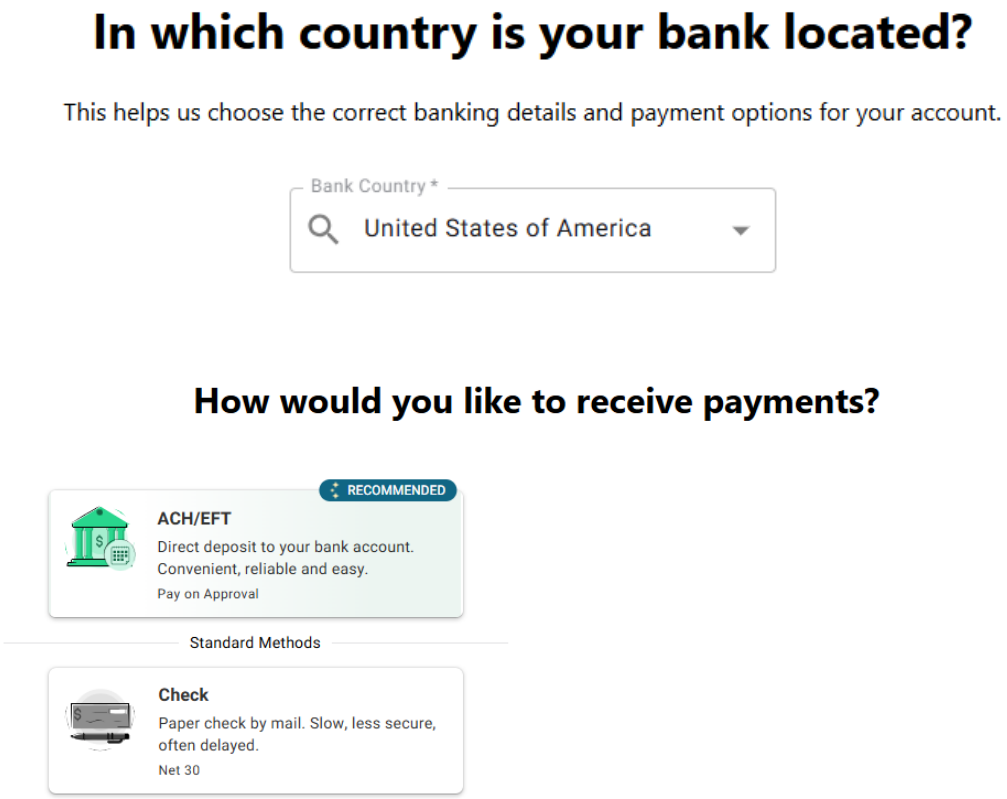
If your Accounts Receivable address is the same as your primary address, select “Same as primary address” at the top of the next page.



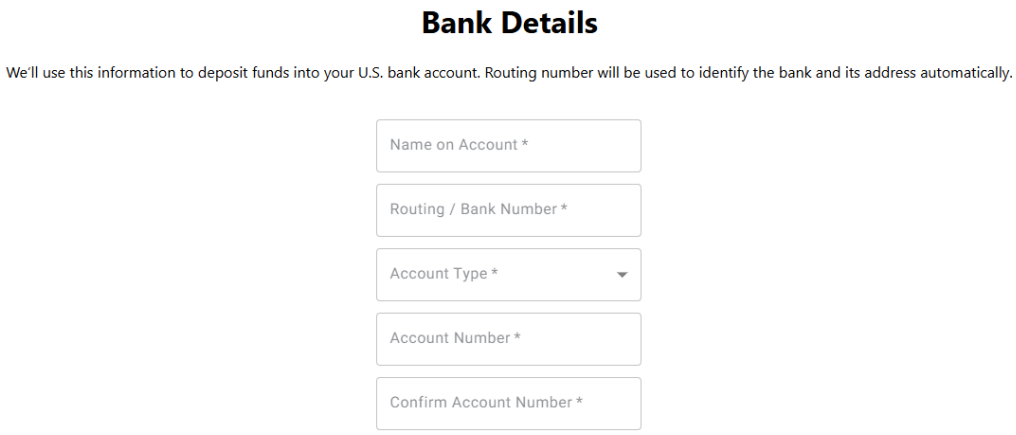
If you click “Same as primary address”, this is the next screen:



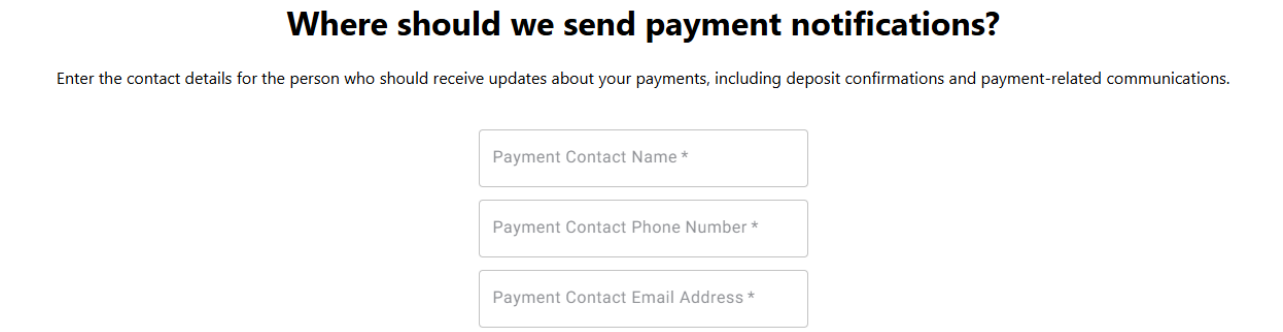
SECTION 4: PAYMENT INFORMATION



ACH Bank Details Needed:

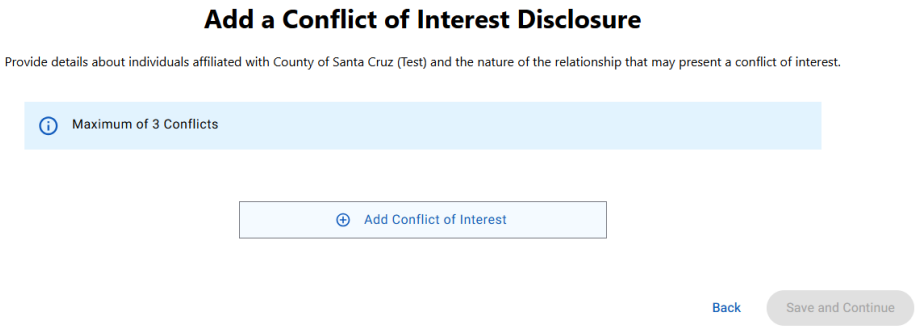


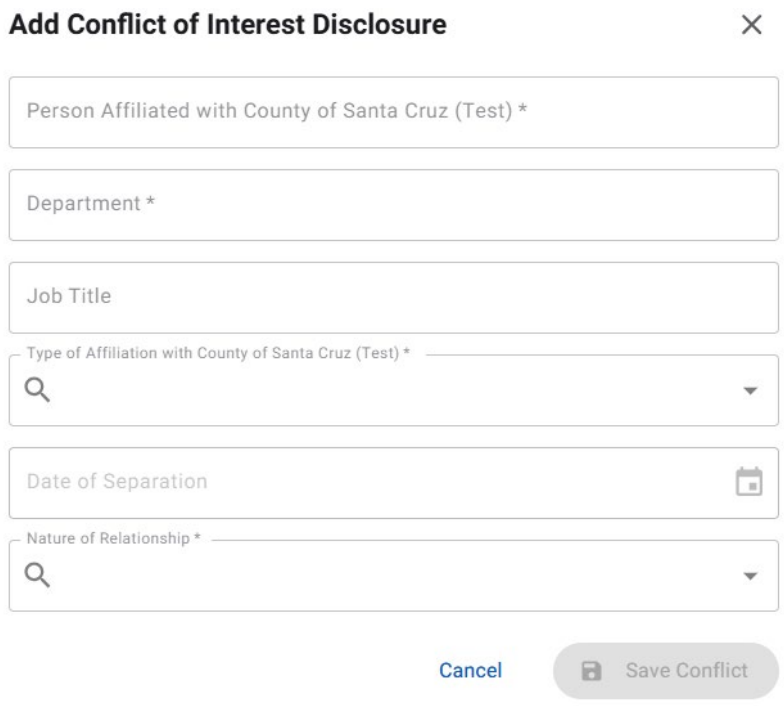
Check Details Needed:



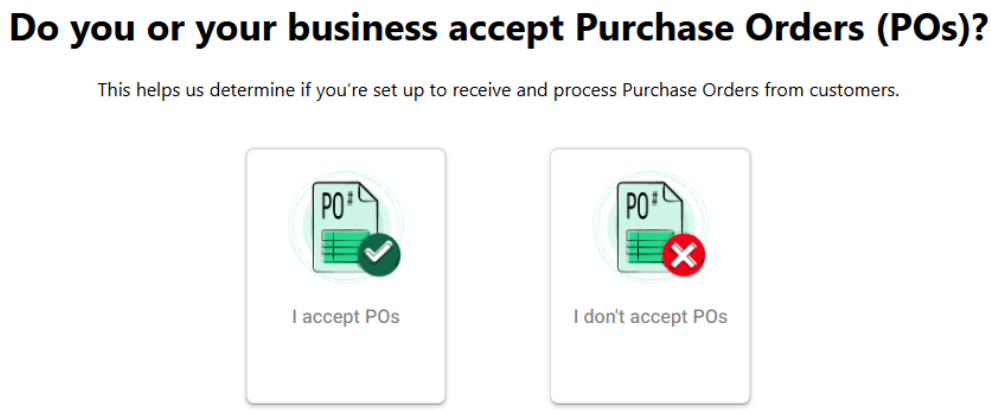
SECTION 5: CONFLICTS OF INTEREST:

If you select "YES", you will be asked to name the conflicts of interest:

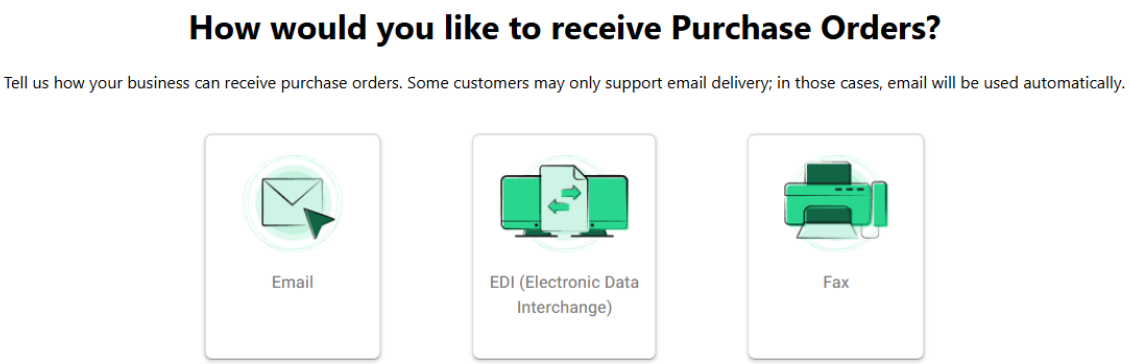




SECTION 6: PURCHASE ORDERS



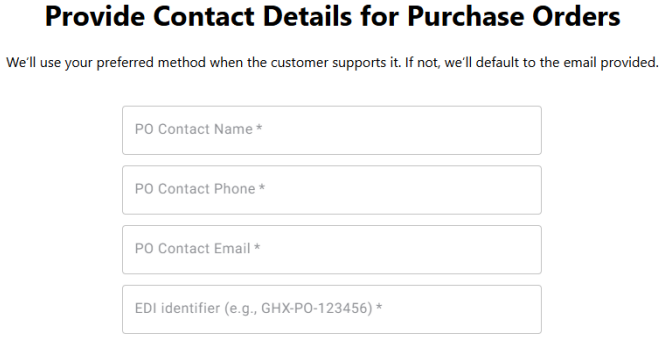
If you accept purchase orders, select from the options:



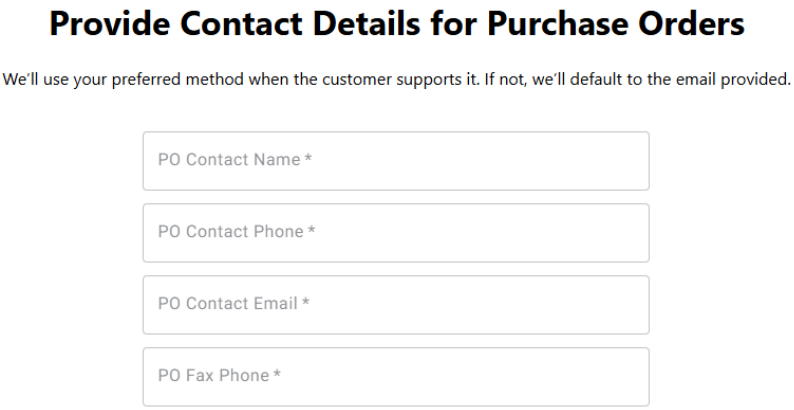
Email Info needed:

- PO contact name, phone and email

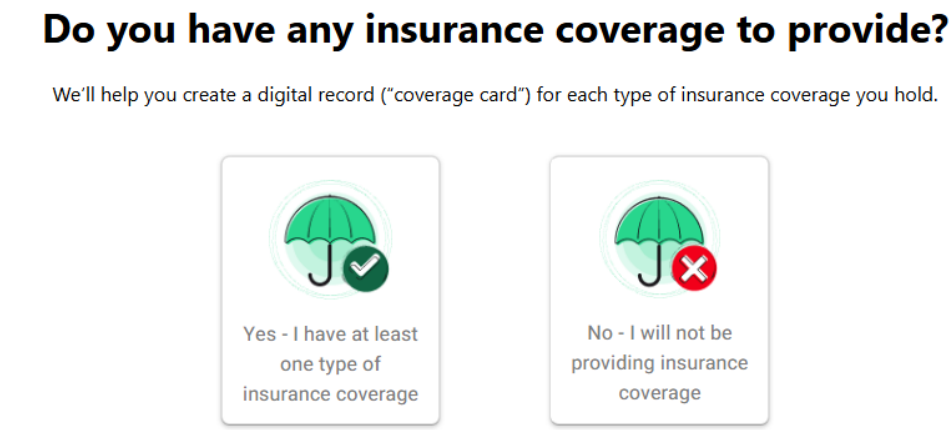
EDI Info needed:

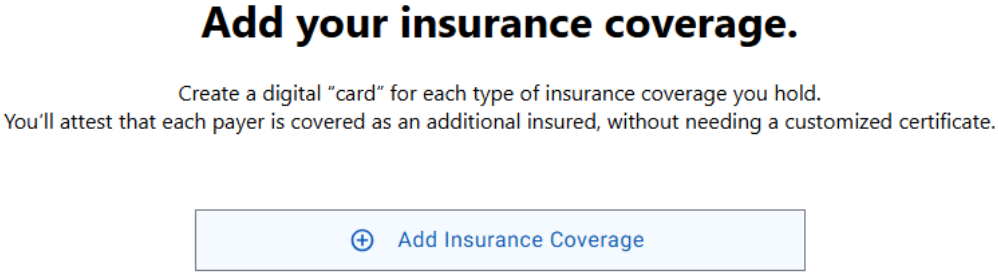


Fax Info needed:

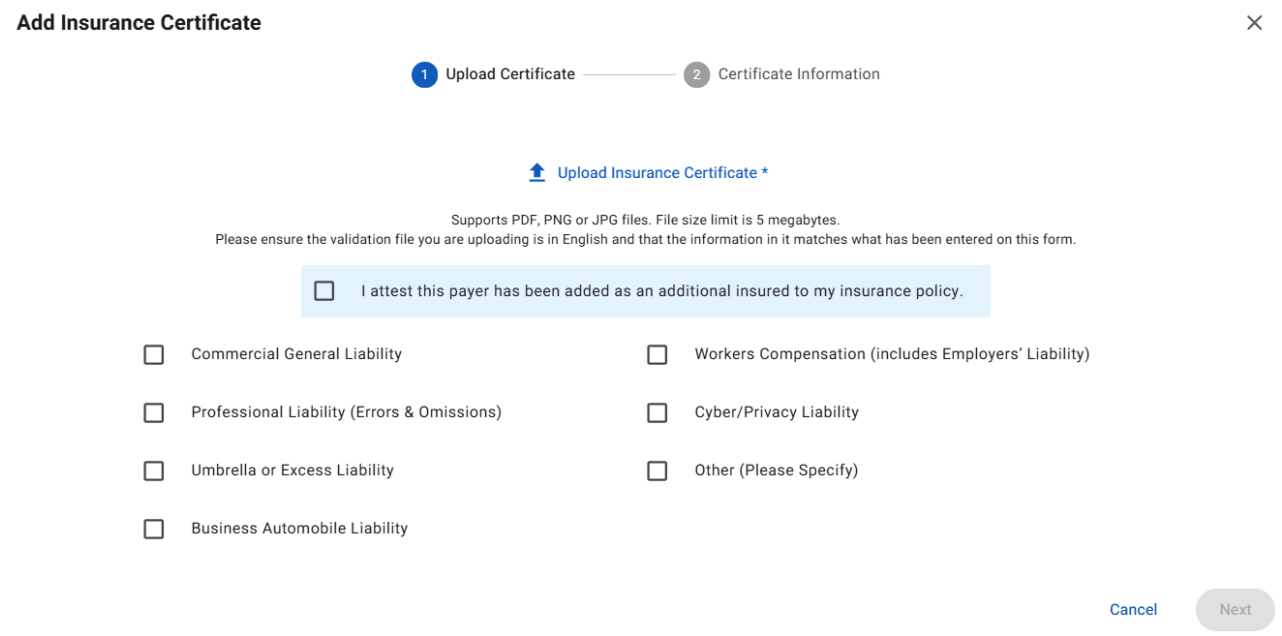


SECTION 7: INSURANCE CERTIFICATES

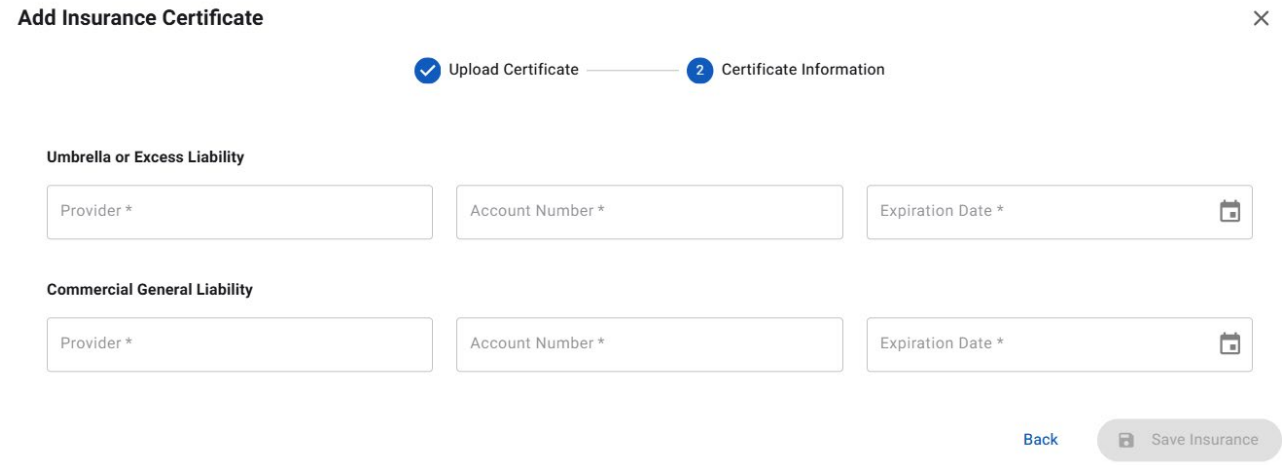




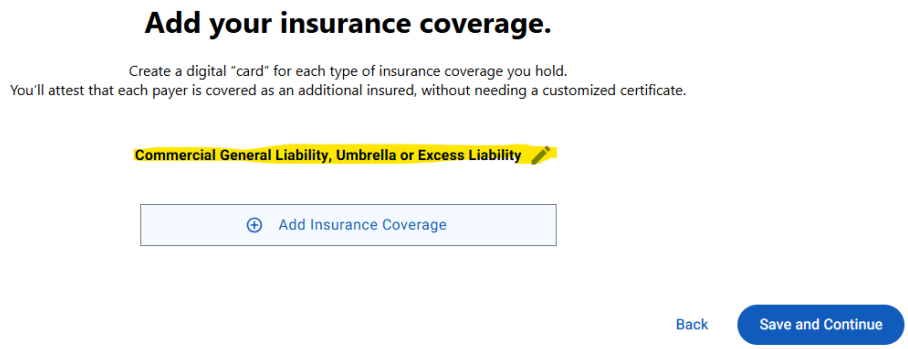
Select all that apply:



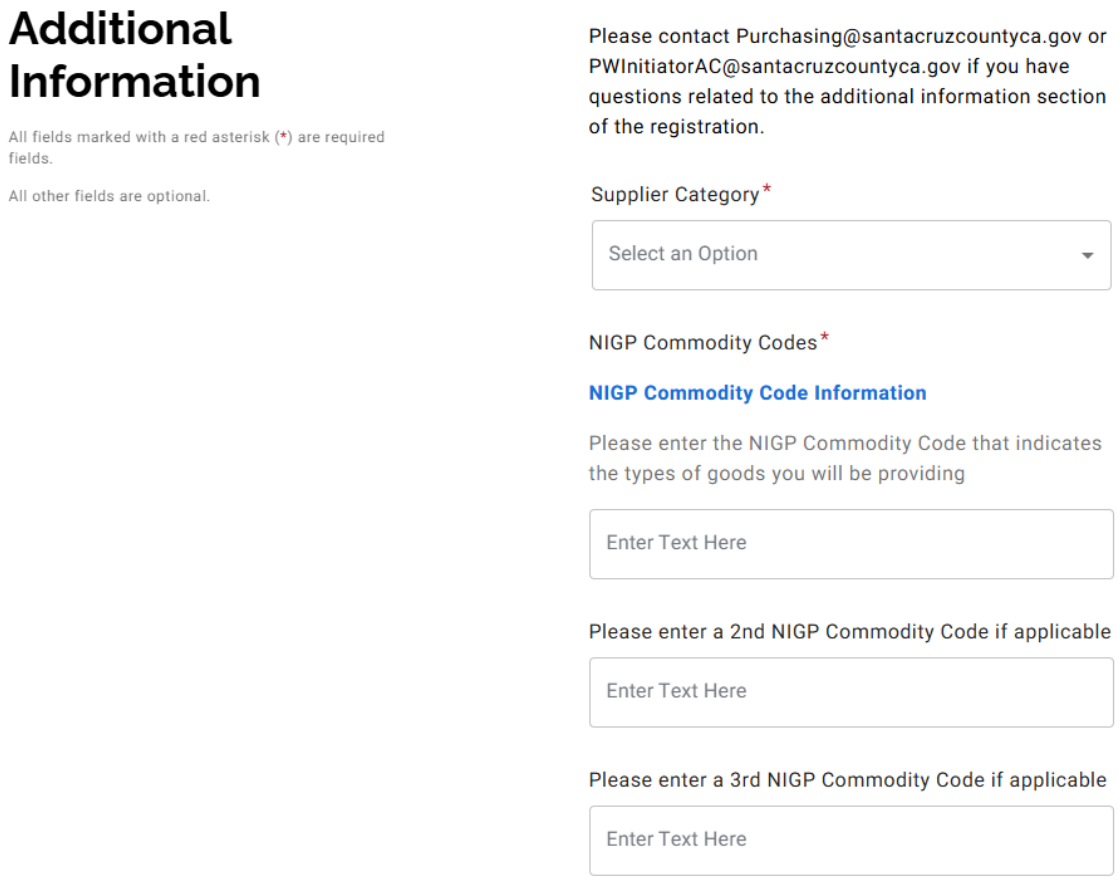
Insurance Details are required for all insurance types selected:



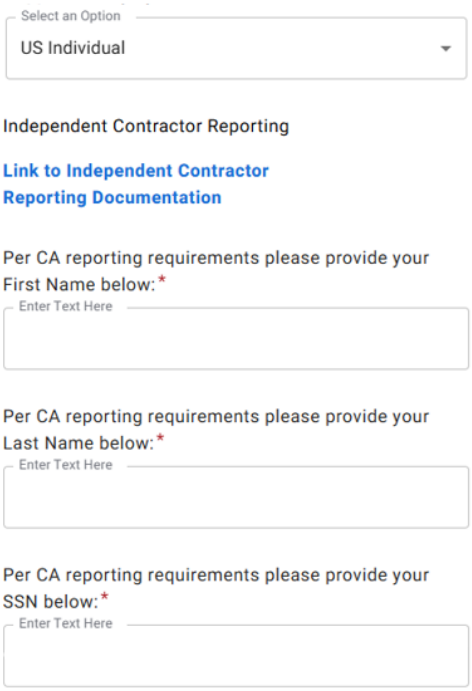
Once you have saved the info above, the save and continue button will be possible.



SECTION 8: ADDITIONAL INFORMATION SECTION



If you select **US Individual**, you will be asked to enter your Name and SSN:



If you are being paid for any of the following, please select all that apply:

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

If you select **US Business Entity**:

Please contact Purchasing@santacruzcountyca.gov or PWInitiatorAC@santacruzcountyca.gov if you have questions related to the additional information section of the registration.

Supplier Category*

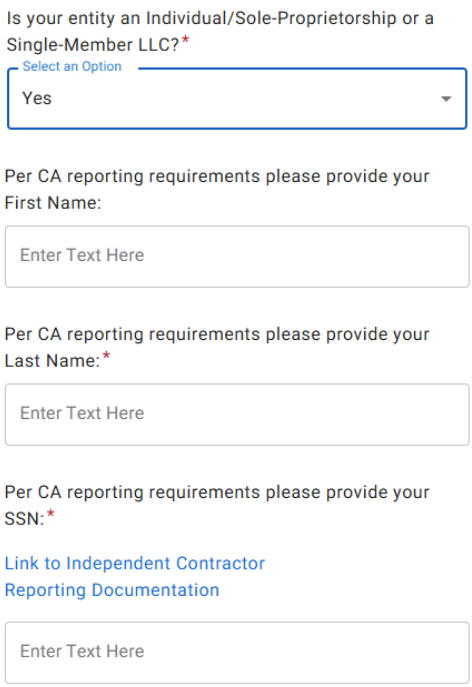
Select an Option

US Business Entity

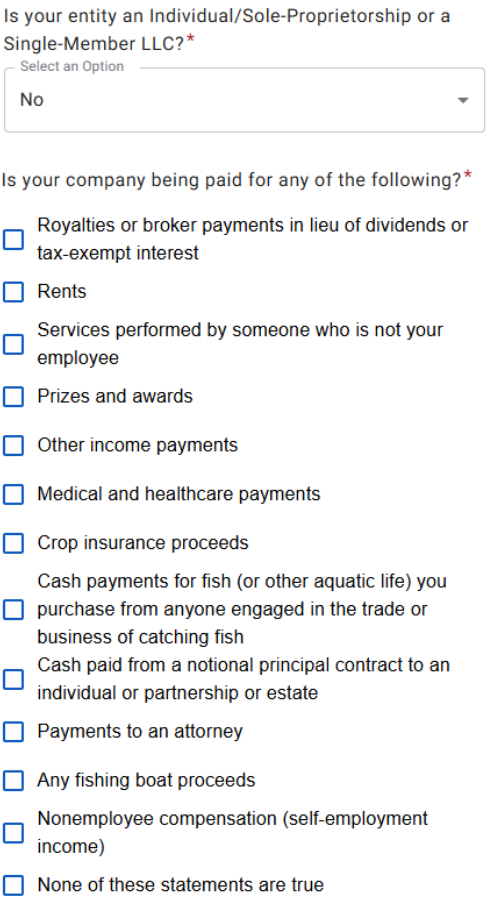
Is your entity an Individual/Sole-Proprietorship or a Single-Member LLC?*

Select an Option

If you answer yes to this question, you must provide your name and SSN as well:

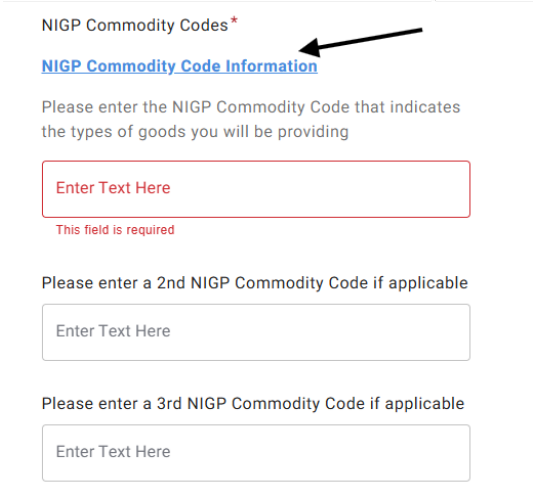


If you answer no to this question, select all that apply that you are being paid for:



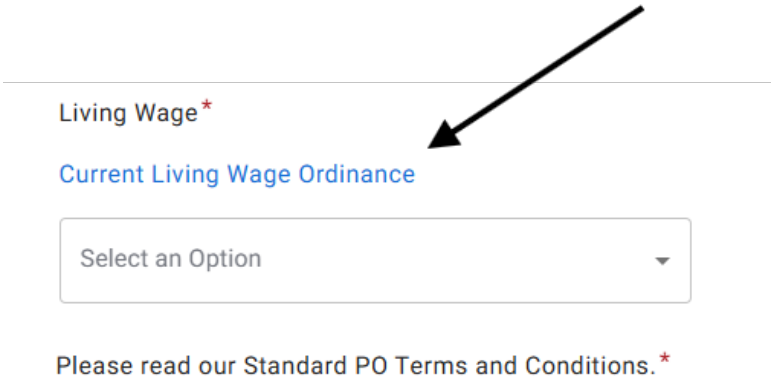
Next you will be asked to add your **commodity codes**.

If you do not know the Commodity Code to use, click the blue link for a list of options:

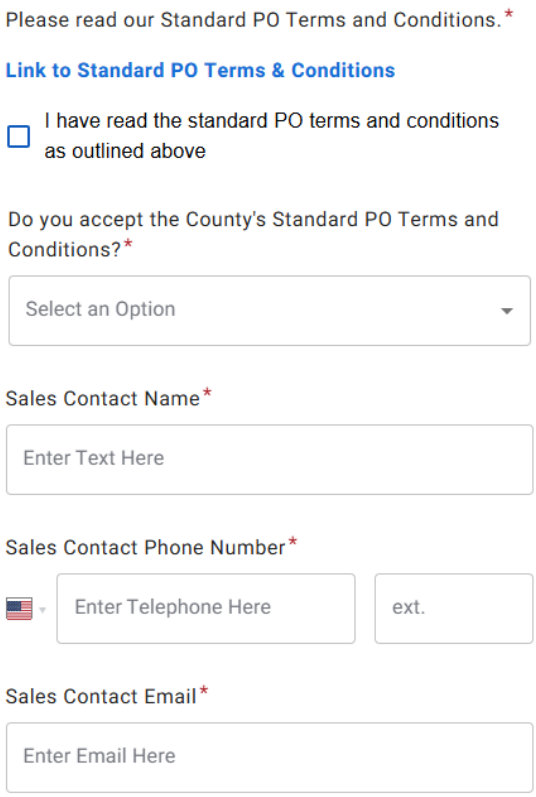


Then you will select an option for the **Current Living Wages Ordinance**.

If you do not know what to select for Living Wage, click the blue link for more information:

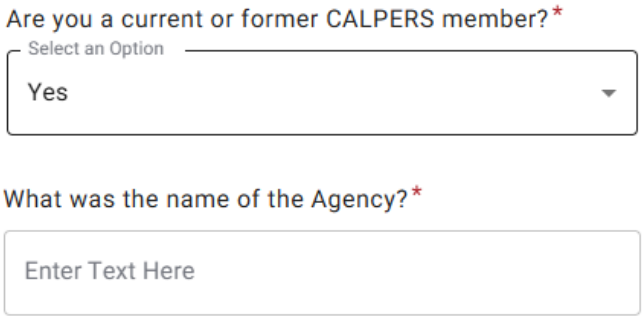


Be sure to read the standard **PO Terms and Conditions** before accepting:

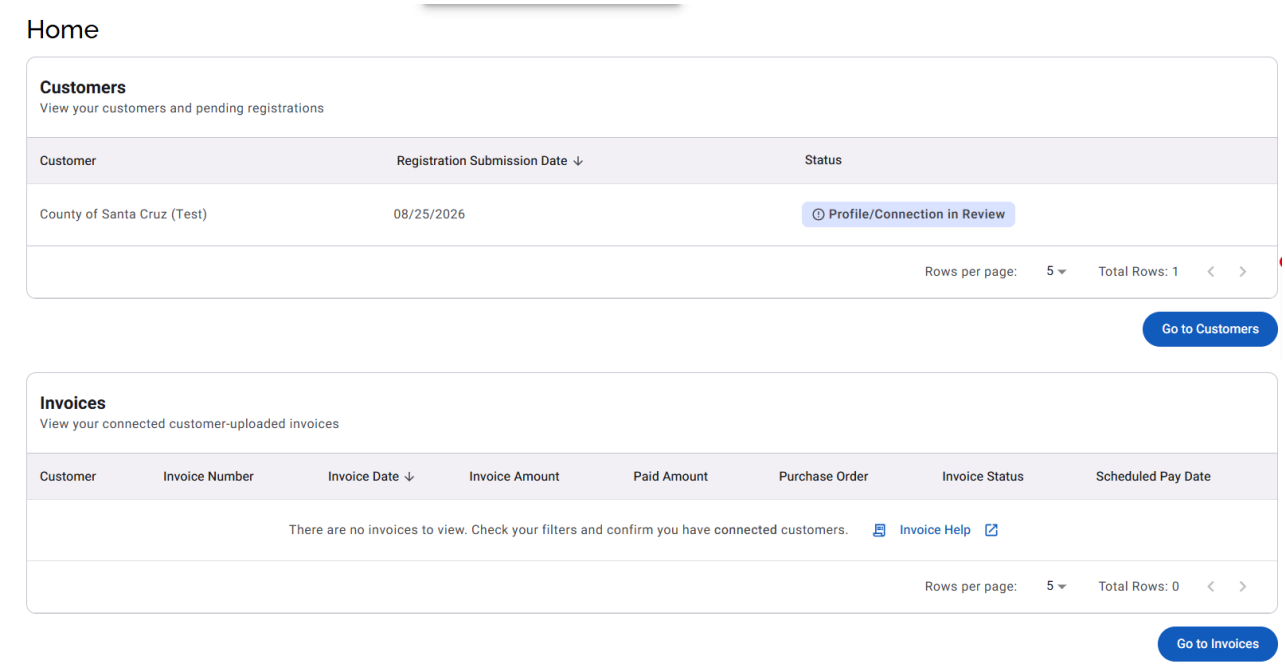


The next question asks about **CALPERS membership**.

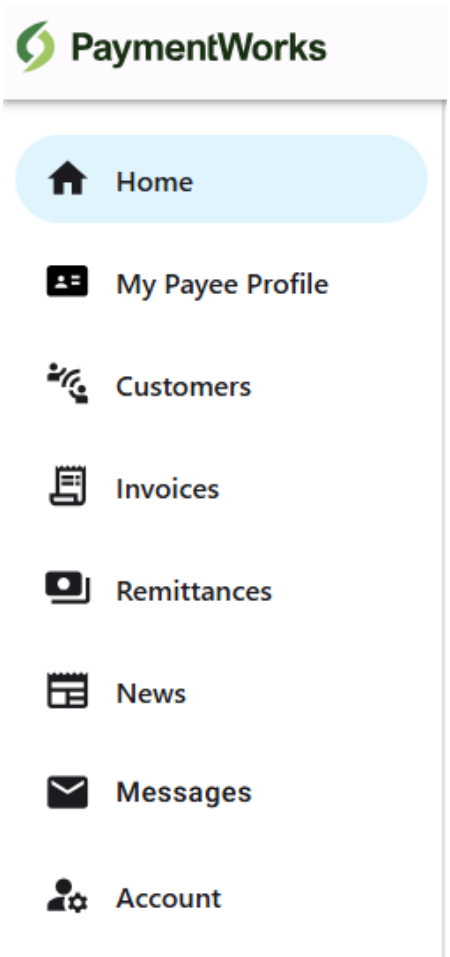
If you select yes, it will ask for your agency info:



Your Profile set up is complete when you are routed to the Home screen:

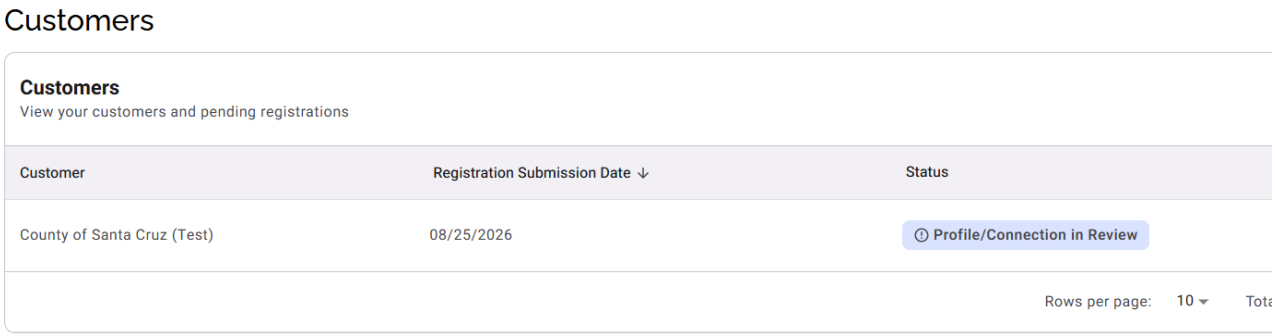


There is a screen of options once you are set up to select from:



Step 5 – Checking PaymentWorks Status Updates

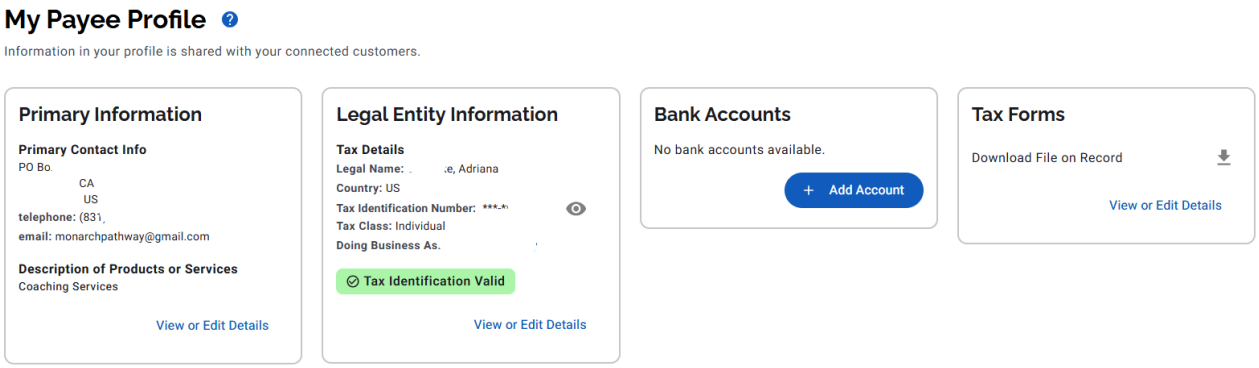
If you want to know the status of your registration with the county, you can see by selecting "Customers":



Step 6 – Updating Your Payment Works Information

Updating Your Business Information

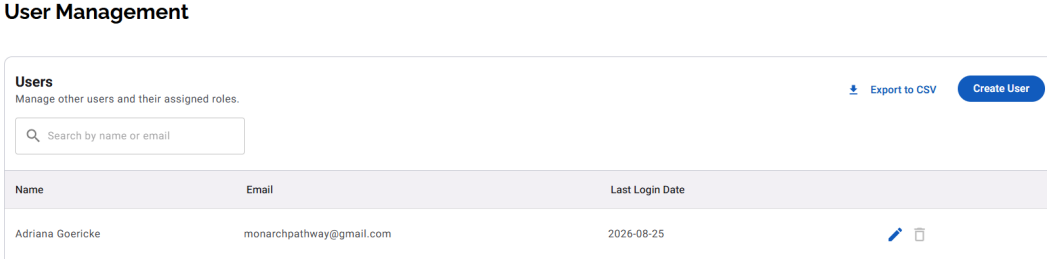
If you need to update your address, legal entity information or bank account in the future, select "My Payee Profile":



Adding Users to Your PaymentWorks Site

Once your PaymentWorks site is established, only you can add additional users access.

If your organization has grown or changed, and you would like to reassign Payment Works data management to someone else on your team, you can add users under "User Management" here:



The Email Address Used for PaymentWorks Is No Longer Active

We highly recommend setting up at least two users on your PaymentWorks account. Having a secondary administrator ensures you never lose access to your account if your primary email goes out of service or a team member leaves.

If you only have one email set up and it is no longer active, please use this link to contact PaymentWorks: https://help.paymentworks.com/contactsupport

If Your Business Was Acquired by Another Firm

If your company was purchased by a new vendor **that is not registered with the County of Santa Cruz**, use the Legal Information section of "My Payee Profile" to specify the new company, and add new company contacts to the users list.

If your company was purchased by a vendor that is **already registered with the County of Santa Cruz**, we will disable your vendor ID and use the other company vendor ID moving forward for purchase orders. You can email your contact with the county to find out if the new business is a county vendor.