

BABSON COLLEGE

PAYEE ONBOARDING PAYEE JOB AID *Workday Strategic Sourcing*

Prepared by: Finance
Operations & Procurement
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TABLE OF CONTENTS

I. Getting Started	1
Purpose	1
Overview	1
When to Use This Process.....	1
II. Completing WSS Account Setup	2
Step 1: Payee Receives the Form Email.....	2
Step 2: Payee Accesses the Portal	2
Step 3: Email Verification Code	3
Step 4: Account Setup	3
Step 5: Multi-Factor Authentication Setup	4
Step 6: Finalizing Account Creation	4
Step 7: Accessing Payee Onboarding Forms	5
III. Completing and Submitting the Payee Onboarding Form	6
Step 1: Access the Onboarding Form(s)	6
Step 2: Complete and Submit the Form.....	6
Step 3: Receive Submission Confirmation.....	9
IV. What Happens Next?.....	10
Step 1: Review and Validation	10
Step 2: Requests for Additional Information	10
Step 3: Approval and Payment Processing	10
V. Summary	11

I. Getting Started

Purpose

This Job Aid provides step-by-step instructions for completing and submitting the Payee Onboarding Form through the **Workday Strategic Sourcing** (“**WSS**”) Portal.

A “**Payee**” is any non-employee individual or organization receiving a payment from Babson College, including suppliers, service providers, and students or individuals receiving gifts, prizes, awards, stipends, or other non-payroll payments.

As part of Babson’s College onboarding and payment validation process, Payees are required to securely provide payment, tax, banking, and other required information directly through WSS. Information submitted through the onboarding process may be reviewed and validated through third-party verification services to support tax validation, banking verification, regulatory compliance, and payment processing.

Overview

WSS is Babson College’s secure onboarding and request management platform used to collect and validate Payee information.

The process allows Payees to securely submit required tax and banking information directly through the WSS portal, helping streamline onboarding, improve data accuracy, and reduce manual follow-up during payment processing.

When to Use This Process

This process should be completed whenever you receive a Payee Onboarding request from Babson College.

Before payment can be issued, you must complete the onboarding process and provide all required payment, tax, and validation information through WSS.

II. Completing WSS Account Setup

Step 1: Payee Receives the Form Email

You will receive an email inviting you to complete the Payee onboarding process. The email includes a link to access the form in the WSS portal (*see Image 1 below*).

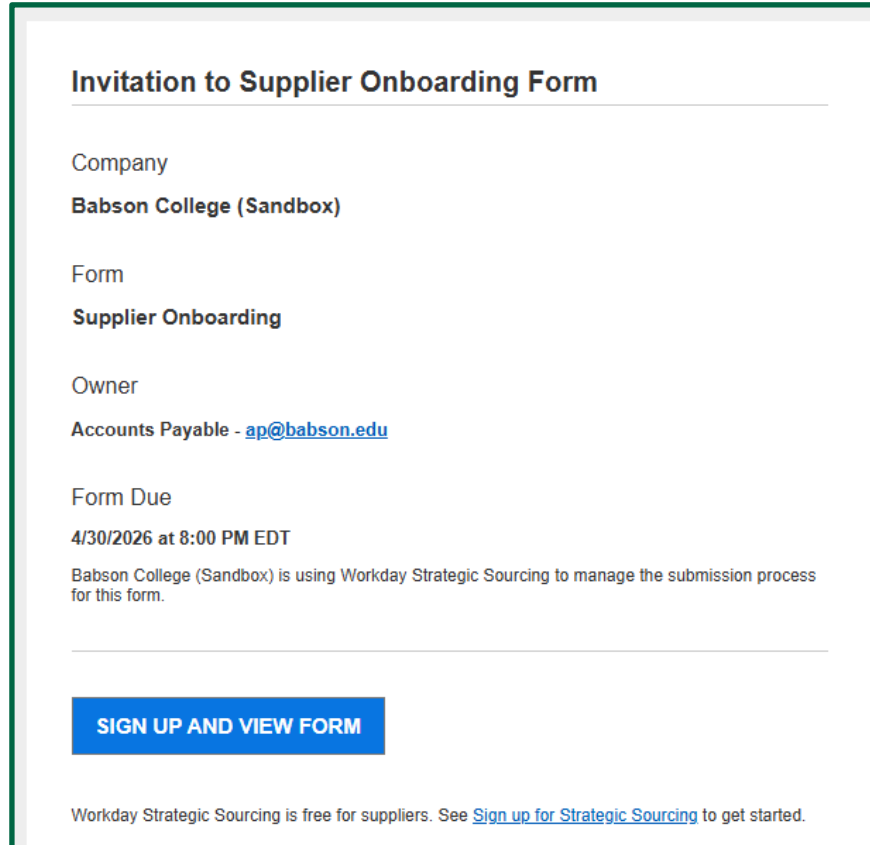


Image 1: Email notification received by Payee

Step 2: Payee Accesses the Portal

Click the link in the email to access the WSS portal. You will be redirected to a verification screen to confirm your email (*see Image 2 below*).

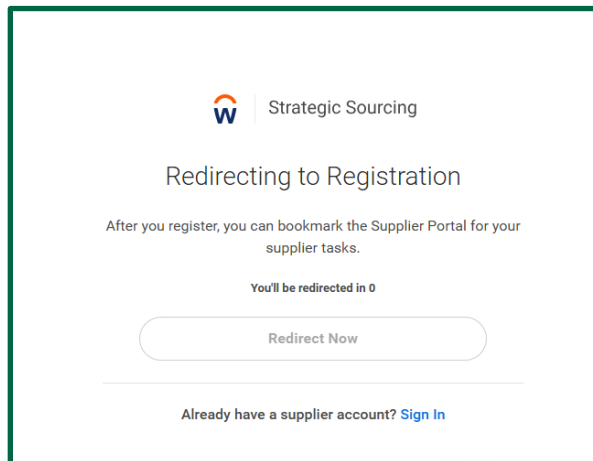


Image 2: Payee WSS redirecting screen

Step 3: Email Verification Code

You will receive a one-time verification code by email. Enter the verification code on the screen and click **Verify Email** to continue (see *Image 3 below*).

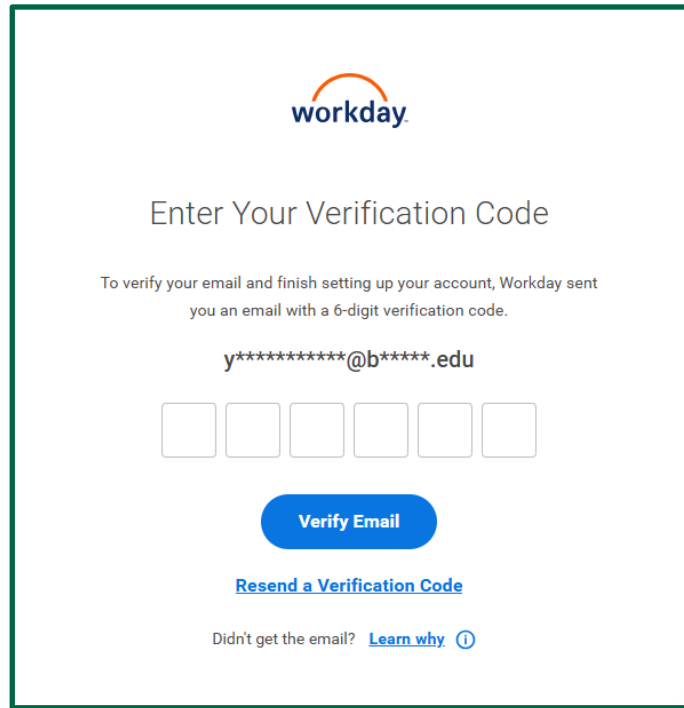


Image 3: Payee WSS redirecting screen

Step 4: Account Setup

To create your WSS account, enter the required profile information listed below (see *Image 4 below*). Required information includes:

- a. First Name
- b. Last Name
- c. New Password
- d. Confirm New Password

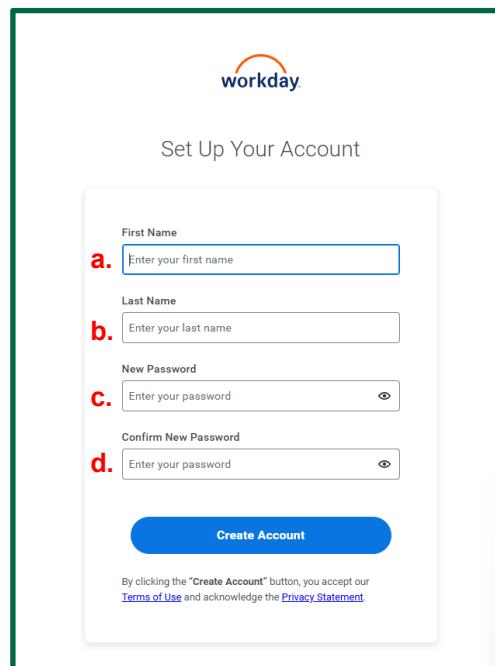


Image 4: Mandatory account set up fields

Step 5: Multi-Factor Authentication Setup

To secure your account, set up multi-factor authentication (MFA) using either SMS or an authenticator app (see *Image 5 below*).

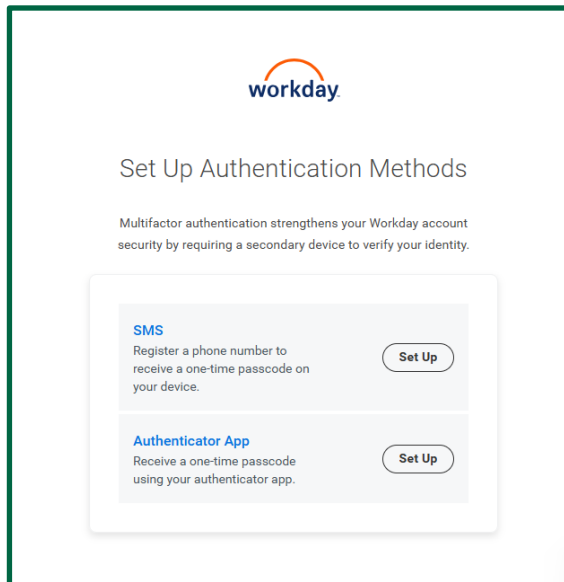


Image 5: Payee multi-factor authentication set up

Step 6: Finalizing Account Creation

You may optionally enter additional account information before clicking Create Account to finalize your WSS account set up (see *Image 6 below*).

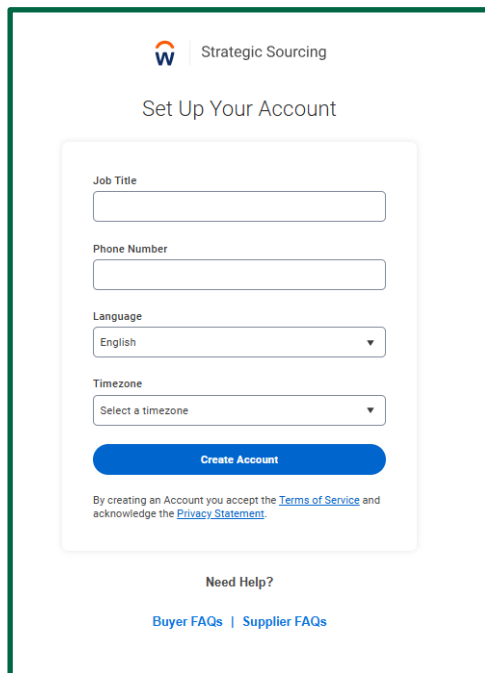


Image 6: Payee optional account completion fields

HINT:

The Payee can click Create Account directly without completing fields in Step 6 above.

Step 7: Accessing Payee Onboarding Forms

After creating your account, you will be redirected to the **Home Screen** of your profile. Click **Manage** to access your assigned onboarding form(s) (see *Image 7 below*).

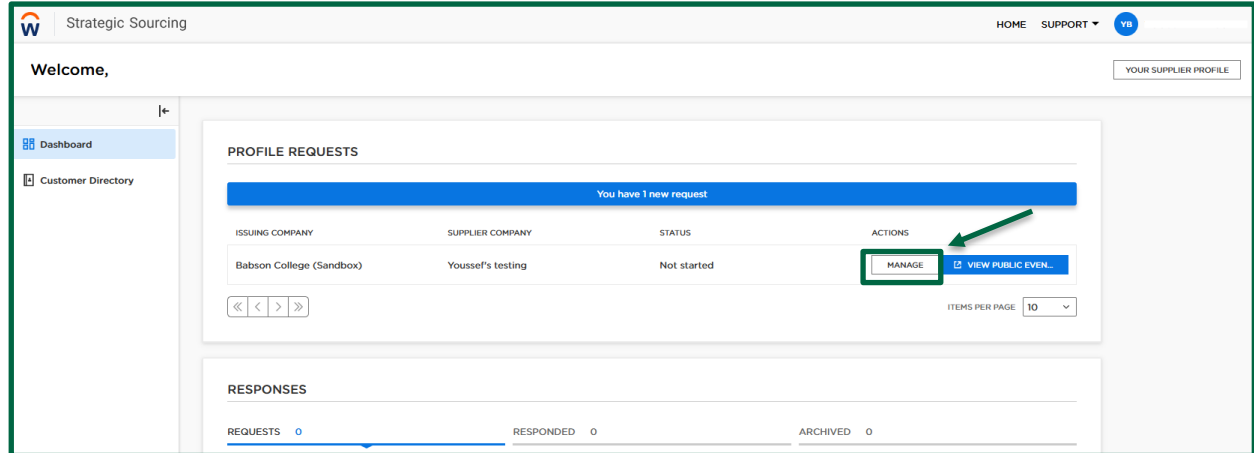


Image 7: Accessing the forms received through the “Manage” button

III. Completing and Submitting the Payee Onboarding Form

Step 1: Access the Onboarding Form(s)

- a. Click **Edit** to begin completing the Payee onboarding form (see Image 8 below).
- b. If you have questions during the onboarding process, you can use the **Message Center** in the portal to contact the Babson College Accounts Payable team.

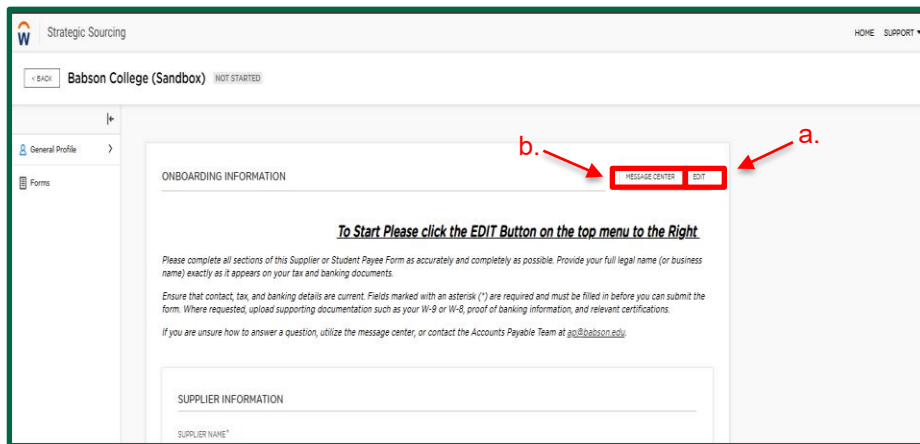


Image 8: Accessing Onboarding Form

Step 2: Complete and Submit the Form

Complete all required sections of the Payee onboarding form. Required fields are marked with an asterisk (*).

The Payee onboarding form is organized in the following sections:

Supplier Information (See image 9 below):

- a. **Supplier Name** – Enter the legal supplier or payee name
- b. **Supplier Category and Supplier Group** – Select the appropriate Supplier Category from the drop-down menu. Once you make your selection, a Supplier Group field will appear. Select the appropriate Supplier Group from the available options.
 - Non-employee students receiving a gift, prize, award, or other non-payroll payment should select the **“Non-Employee Student/Award”** option from the drop-down list.



Image 9: Onboarding Form – Supplier Information

Business Information (See image 10 below):

- c. Address(es)** – Enter the legal supplier or payee address
- d. Phone(s)** – Enter the appropriate phone number information.
- e. Tax Information** – Enter the required tax information.

Multiple addresses and phone numbers may be added within these sections using the blue action buttons. One entry must be designated as the primary record where applicable.

Selecting a tax country may cause additional required tax fields to appear based on the country selected.

BUSINESS INFORMATION

ADDRESSES ADD ADDRESS

Primary Address

c. ADDRESS COUNTRY* USAGE*

Select country Select Usage

PHONES ADD PHONE

Primary Phone

d. PHONE COUNTRY* INTERNATIONAL CALLING CODE

Select country (empty)

TAX INFORMATION ADD TAX ID

REQUIRED*

Primary Tax ID

e. TAX COUNTRY*

Select country

Image 10: Onboarding Form – Business Information

Banking Information (See image 11 on next page):

- f. Bank Account(s)** – Enter bank account information for EFT/electronic payments/international wire. If you do not include a bank account number, you will be paid via check, except for international Payees, Babson does not send checks to international addresses.
- g. Payment Type** – Select the preferred payment type, if applicable.

Additional banking fields may appear after bank account information is entered.

If bank account information is not provided, payments will be issued by check. Payees who provide bank account information will be paid via ACH/electronic payment.

BANKING INFORMATION

BANK ACCOUNTS ADD BANK ACCOUNT

BANK ACCOUNT NICKNAME

ACCOUNT DETAILS

f. BANK ACCOUNT COUNTRY* BANK ACCOUNT TYPE*

Select country Select type

g. PAYMENT

DEFAULT PAYMENT TERM

Default Payment Term

Image 11: Onboarding Form – Banking Information

Contact Information (See image 12 below):

- h. Contact(s)** – Enter the contact information for the individual who will be responsible for all information on the onboarding form.

h. CONTACTS ADD CONTACT

FIRST NAME* LAST NAME*

Marisa Oleary

CL ...

EMAIL* JOB TITLE

mserio165+232323@gmail.com Enter contact title

PHONE COUNTRY PHONE

Select country Enter contact phone

PHONE DEVICE TYPE

Select Phone Device Type

Image 12: Onboarding Form – Contact Information

Attachments and Submission (See image 13 on next page):

- i. Attachments** – Upload all required supporting documentation, including signed and dated tax forms.
- j. Save as Draft** – Save the form and return later to complete the onboarding request.
- k. Submit** – Submit the form once you have completed all required fields for processing.

Once submitted, international Payees will also receive a separate email from noreply@sprintax.com requesting completion of an electronic questionnaire used to determine applicable tax withholding and reporting requirements. Prompt completion of the questionnaire is required to help avoid delays in payment processing.

ATTACHMENTS

Attachment Requirement - Tax Documentation

A current, signed tax form must be uploaded and remain on file at all times. The signature may be handwritten or digitally applied.

If you require a blank tax form, you can find one on our website:

For U.S.-Based Entities:

- Please upload the most recent version of Form **W-9** (Request for Taxpayer Identification Number and Certification)

For International Entities:

- Form W-8BEN and Instructions
- Form W-8BEN-E and Instructions

Additional Requirement for Foreign Entities or Individuals:

You are also required to complete an electronic Tax Residency Questionnaire to determine applicable tax withholding status. You will receive separate instructions via email from noreply@sprintax.com. Please complete this questionnaire promptly to avoid any delays in payment processing.

REQUIRED*

FILE NAME	FILE SIZE	UPLOAD DATE	UPLOADED BY	FILE TYPE
No items available.				

i. DRAG/DROP DOCUMENTS or [BROWSE FILES](#)

j. **SAVE AS DRAFT** **k.** **SUBMIT**

Image 13: Onboarding Form – Attachments / Submission

After submission, the form status will display as **Approval Pending** while the information is reviewed. If additional information or corrections are required, the form may be returned for updates and resubmission by clicking the **Edit** button. (see image 14 below).

Strategic Sourcing HOME SUPPORT ▾

Babson College (Sandbox) Onboarding Form APPROVAL PENDING

Supplier Information

ONBOARDING INFORMATION MESSAGE CENTER EDIT

To Start Please click the EDIT Button on the top menu to the Right

Please complete all sections of this Supplier or Student Payee Form as accurately and completely as possible. Provide your full legal name (or business name) exactly as it appears on your tax and banking documents.

Ensure that contact, tax, and banking details are current. Fields marked with an asterisk (*) are required and must be filled in before you can submit the form. Where requested, upload supporting documentation such as your W-9 or W-8, proof of banking information, and relevant certifications.

If you are unsure how to answer a question, utilize the message center, or contact the Accounts Payable Team at ap@babson.edu.

Image 14: Onboarding Form – Attachments / Submission

Step 3: Receive Submission Confirmation

After submitting the Payee onboarding form, you will receive an email confirmation indicating that your submission was successfully received and is pending review by the Babson College Accounts Payable team (see image 15 below).

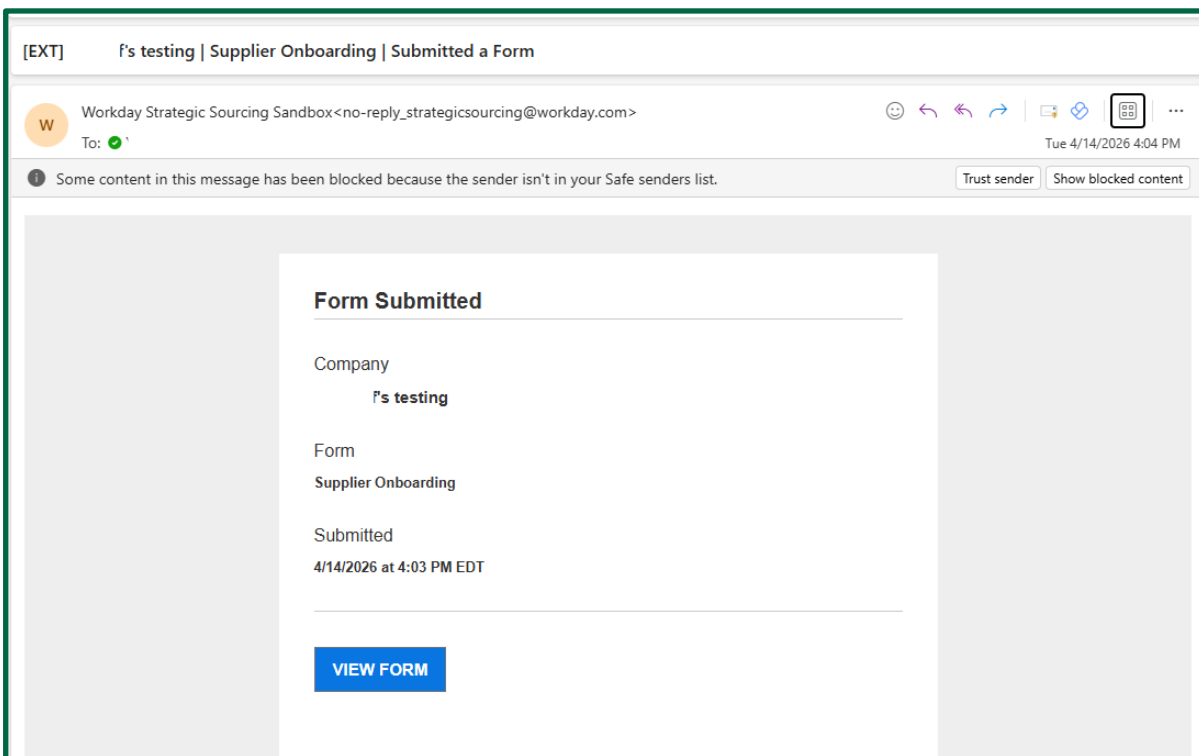


Image 15: Onboarding Form – Attachments / Submission

IV. What Happens Next?

Step 1: Review and Validation

After submission, the Babson College Accounts Payable team will review the information and supporting documentation provided. Information submitted through the onboarding process may be reviewed and validated to support tax validation, banking verification, regulatory compliance and payment processing.

Step 2: Requests for Additional Information

If additional information, documentation or corrections are required, you may be contacted by the Accounts Payable team or asked to update and resubmit your onboarding form.

Step 3: Approval and Payment Processing

Once all required information has been reviewed and approved, your onboarding record will be completed, and payments may be processed in accordance with Babson College payment procedures.

V. Summary

You now have completed the steps required to submit the Payee onboarding form in WSS. For questions, updates, or required actions related to your onboarding submission, use the Message Center within the WSS portal or contact the Babson College [Accounts Payable](#).