



Recipient Select Plus

Domestic Supplier Registration Process

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I. PURPOSE

To document the process for domestic supplier to register for the Recipient Select Plus portal.

II. SCOPE

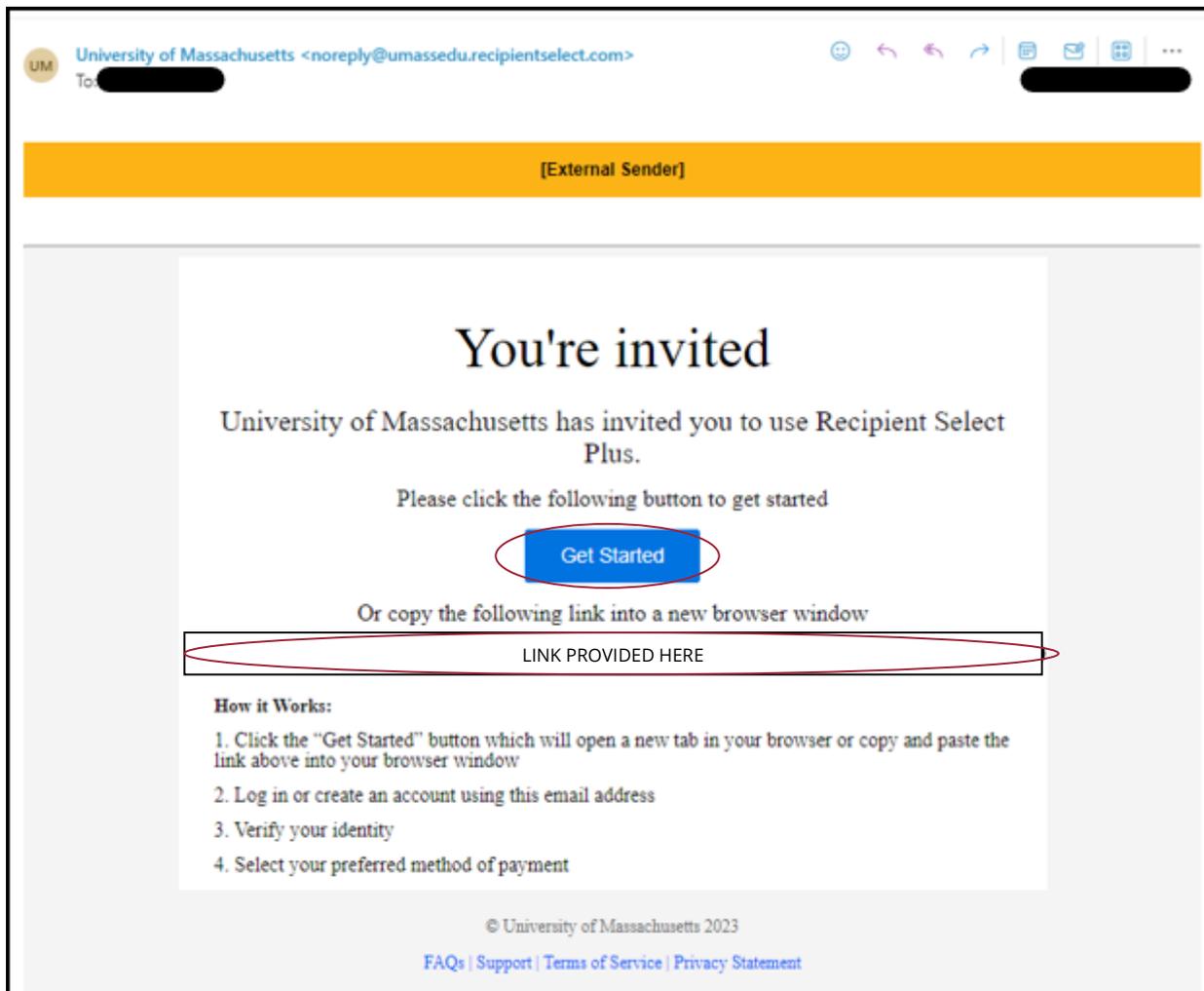
This process is only applicable to domestic individual suppliers. This process is only kicked off after a supplier has become a registered supplier with UMass and payment has been processed.

III. CONTACTS

Treasury
Treasurer_ePay@umassp.edu

IV. PROCEDURE

1. Once a payment has been initiated from UMass, the supplier receives invitation email from noreply@umass.edu.recipientselect.com. The supplier will click "GET STARTED" blue button or copy the link provided within the email.



2. Link will direct supplier to RSP portal. The email address will automatically populate in the email field. The email address will be the same email address the email invitation was sent to i.e., the email address provided to UMass during the UMass supplier registration process. **Please note that the email field cannot be changed.** Supplier will create a password and re-enter the created password. Supplier must check off the 2 boxes for terms and conditions and privacy statement. Next, the supplier will click "SUBMIT"

Register

Welcome! To receive your payment, please provide the information below to begin creating an account.

Email *

EMAIL ADDRESS WILL BE PREFILL

Password * 

Enter Password

Re-enter Password *

Re-enter Password

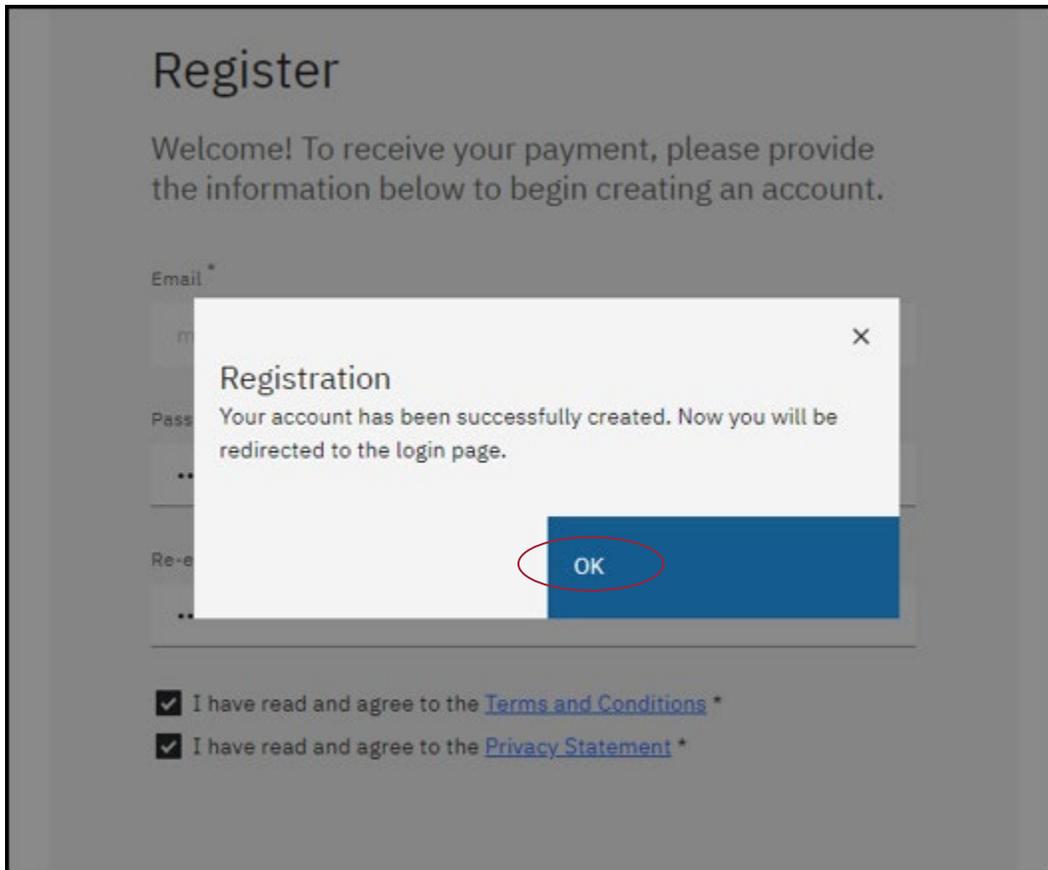
I have read and agree to the [Terms and Conditions](#) *

I have read and agree to the [Privacy Statement](#) *

Register

If you have already created an account, please [Login](#)

- Supplier will receive a pop-up box stating the registration was successfully created. Supplier clicks "OK".



4. Supplier is redirected to RSP portal login page. Supplier will enter in the email address and password created for the RSP portal. Supplier will click "LOGIN"



Login

Welcome Back! Please sign in using the email address and password you used to register.

Email *

Enter Email Address

Password *

Enter Password

Login

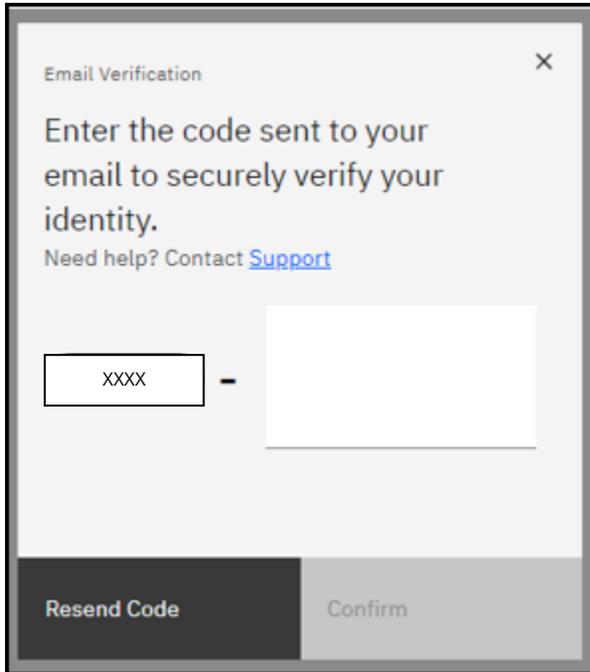
[Forgot your Password?](#)

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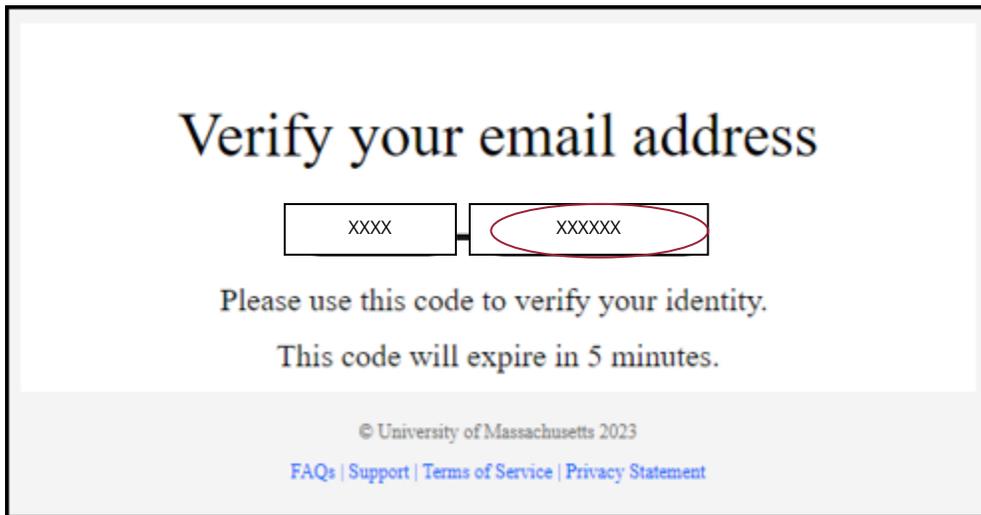
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5. The supplier will go through the two-step authentication process.

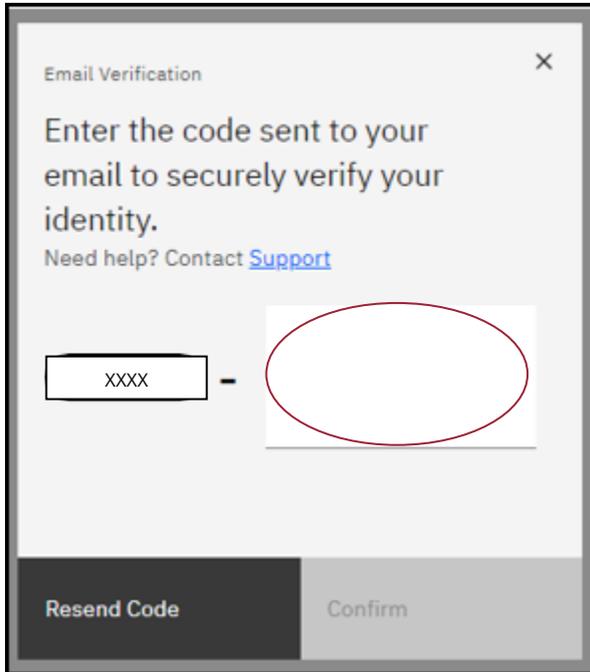




- The supplier will need to check their email for an email containing a verification code.



- Supplier will enter in the 6 digits after the hyphen. Supplier will click "CONFIRM".



8. Supplier will be directed to the RSP portal to "SET UP ACCOUNT". Supplier will need to select the "COUNTRY OF RESIDENCE" and "DATE OF BIRTH". Supplier clicks "CONTINUE".

 **University of Massachusetts** Recipient Select Plus
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⌵ A 

Set Up Account Add Payment Information Confirm Details

Set Up Account

Help us get to know you:

We want to make sure you get your money safely and securely. It is important that you enter your legal information so that we can properly validate your identity and process your payment.

Country of Residence *

Select ▼

Date of Birth * ⓘ

Month Day Year

Select ▼ Select ▼ Select ▼

Continue

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9. Supplier's address in the United States will be requested to enter the following fields and click "CONTINUE".
 - a. First Name
 - b. Middle Name (not required)
 - c. Last Name

- d. Address Line 1
- e. Address Line 2 (not required)
- f. City
- g. State (drop down options)
- h. Zip code
- i. Phone number
- j. Social security number (SSN)

The screenshot shows the 'Set Up Account' page for the University of Massachusetts Recipient Select Plus. The page has a header with the UMass logo and navigation links for Amherst, Boston, Dartmouth, Lowell, Medical, Law, and Online. The main navigation includes 'Set Up Account' (selected), 'Add Payment Information', and 'Confirm Details'. The title is 'Set Up Account' with a subtitle 'Thank you! Just a few more details:'. Below this is a note: 'Please provide the following details in the space provided so that we can set up your account. First and Last name must match your payment account information and only use Latin characters.' The form fields are: First Name (placeholder: Enter First Name), Middle Name (placeholder: Enter Middle Name), Last Name (placeholder: Enter Last Name), Address Line 1 (placeholder: Street Address), Address Line 2 (optional) (placeholder: Unit #, Apt, Suite), City (placeholder: City), State (dropdown menu with 'State' selected and a checkmark), Zip Code (placeholder: Zip Code), Phone Number (placeholder: +XXXXXXXXXXXX), and SSN (placeholder: XXX-XX-XXXX). At the bottom, there are 'Back' and 'Continue' buttons. The 'Continue' button is circled in red. The footer contains the copyright notice '© University of Massachusetts 2023' and links for 'FAQs', 'Support', 'Terms of Service', and 'Privacy Statement'.

10. The supplier will now select how they would like to receive payments. Supplier can click on any option available and click “CONTINUE”. Supplier can setup multiple payment methods. Supplier can have multiple “BANK TRANSFER” (direct deposit) accounts setup.

University of Massachusetts Recipient Select Plus

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Set Up Account Add Payment Information Confirm Details

Add Payment Method

Almost there! Please select how you would like to receive your payment.

Account information must be correct to avoid potential payment rejection. First and Last Name on your profile must match your payment account information.

Bank Transfer ⓘ

Zelle® ⓘ

PayPal ⓘ

Back Continue

11. If supplier selects “BANK TRANSFER” go to step 11-a. If the supplier selects “ZELLE” or “PAYPAL” skip to step 12 or 13.

a. Supplier is requested to enter the following information and click “CONTINUE”. Go to step 14.

- i. Account Type (Checking or Savings)
- ii. Routing Number
- iii. Account Number
- iv. Confirm Account Number
- v. Nickname for Bank Transfer
- vi. Billing Address (can check off if same as profile address)
 1. if checked off, the fields below do not need to be completed
 2. if not checked off, the fields below need to be completed
- vii. Address Line 1
- viii. Address Line 2 (not required)
- ix. City
- x. State (drop down)
- xi. Zip code

- Set Up Account
- Add Payment Information**
- Confirm Details

Add Payment Method

Almost there! Please select how you would like to receive your payment.

Account information must be correct to avoid potential payment rejection. First and Last Name on your profile must match your payment account information.



Set this as my preferred payment method for all future payments.

Transfer method

ACH ⓘ

Account type

- Checking
- Savings

Routing Number *

Enter Routing Number

Account Number *

Enter Account Number

Confirm Account Number *

Enter Account Number

What would you like to call this account? *

Enter Account Nickname

Billing address

Same As Profile Address

Address Line 1 *

Street Address

Address Line 2 (optional)

Unit #, Apt, Suite

City *

City

State *

State

Zip Code *

Zip Code

Back

Continue

12. If supplier selects “Zelle” go to step 12-a. If the supplier selects “PAYPAL” skip to step 13.

a. Supplier is requested to enter the following information and click “CONTINUE”. Go to step 14.

i. The Zelle token can either be the email address or phone number provided in the Set-Up Account section or the supplier can choose to use another token.

ii. Billing Address (can check off if same as profile address)

1. if checked off, the fields below do not need to be completed

2. if not checked off, the fields below need to be completed

a. Address Line 1

b. Address Line 2 (not required)

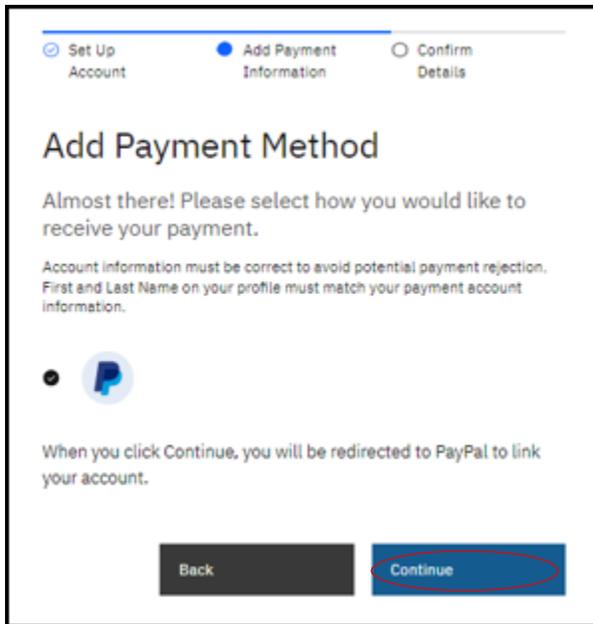
c. City

d. State (drop down)

e. Zip code

13. If supplier selects “PayPal” go to step 13-a.

- a. Supplier will click “CONTINUE”. The supplier will be redirected to the PayPal website to continue to link the PayPal account to the supplier’s RSP account. **NOTE: the name (first and last name) used for the RSP portal MUST be the name on the PayPal account.** Go to step 14.



14. The supplier will be asked to confirm the details they have entered in the screens above.

University of Massachusetts Recipient Select Plus

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☑ Set Up Account ☑ Add Payment Information ● Confirm Details

Confirm Your Details

Please ensure your information is correct. You will not be able to change your payment method or details once the payment has been initiated. To make changes, go back one screen or click “edit” on this screen

Account Information: [edit](#)

ALL INFORMATION ENTER WILL BE LISTED HERE

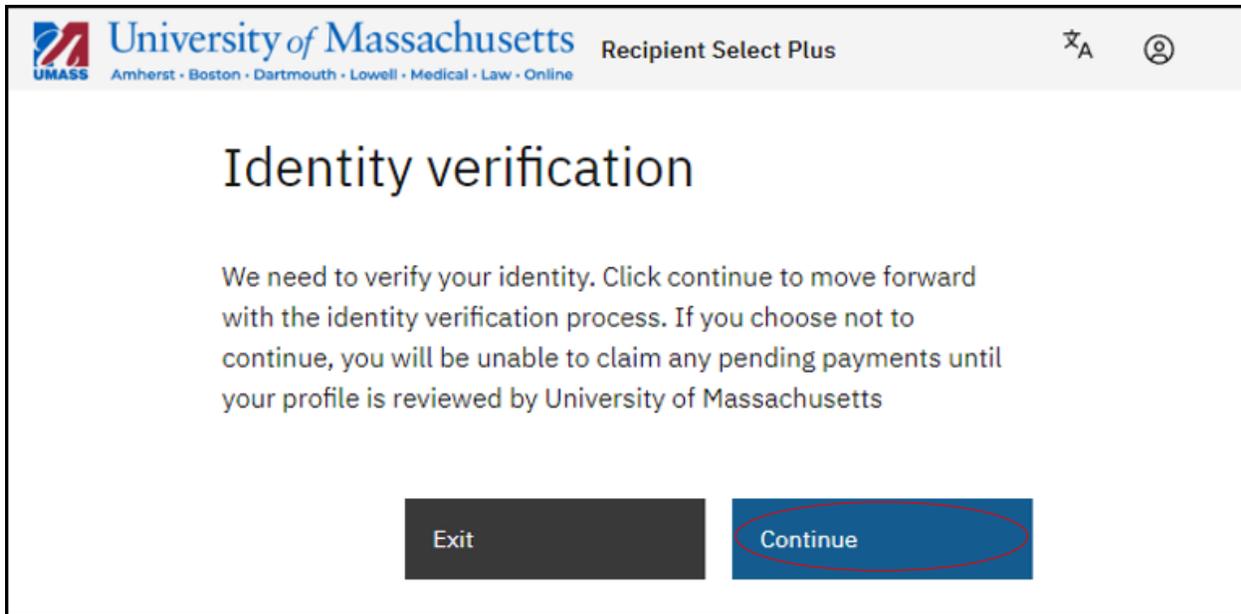
Delete

Complete Registration

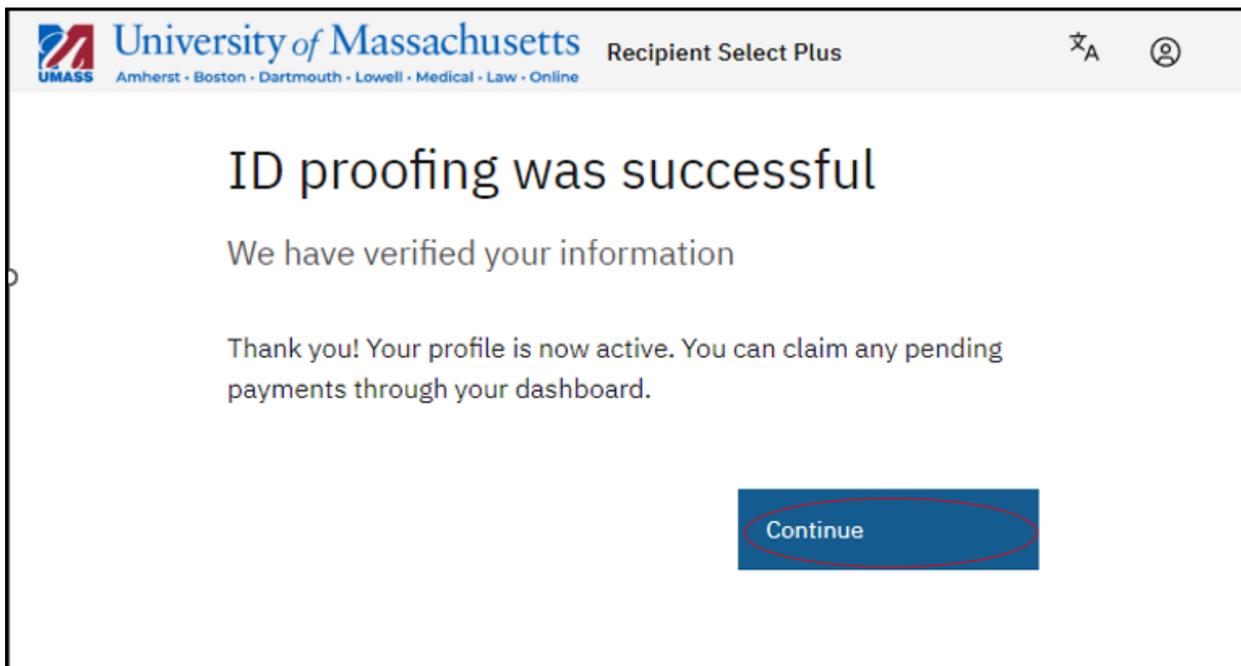
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15. The supplier will go through the “IDENTITY VERIFICATION” process. Supplier clicks “CONTINUE” and waits a few moments before the screen refreshes.



16. The supplier will see “ID proofing was successful”. Supplier clicks “CONTUNIE”. If the supplier’s ID proofing fails, the supplier will have 2 chances to correct the account information. If the supplier fails after the 2 chances, the supplier will receive a failed ID proofing message and will not be able to continue with the process. The supplier should email: Treasurer_ePay@umassp.edu for ID proofing failure support.



17. The supplier will be directed to the RSP portal Dashboard section, where payment can be accepted. Here the supplier clicks “ACCEPT PAYMENT”.



Dashboard



Hi, !

Upcoming Payments



Past Payments

No past payments

18. Supplier will review the payment information and can either “EDIT” the payment method to change or add payment method or select the saved

“PAYMENT METHOD” from the drop down. The supplier will check off the Terms and Conditions box and click “ACCEPT PAYMENT”

Initiate Payment

Please ensure your information is correct

You will not be able to change your payment method or details once the payment has been initiated. To make changes, click “edit” on this screen

Payment Information:

Date:

Description:

Email:

Amount:

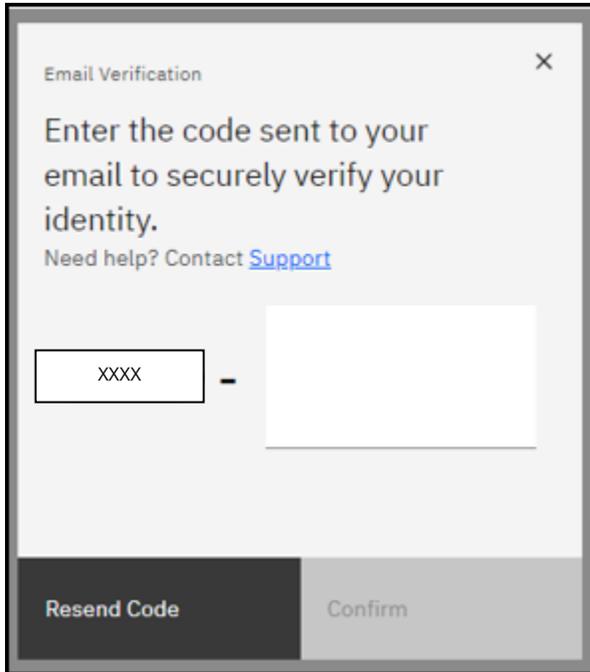
Payment Method: [edit](#)

Payment Method

Currency

I agree to the Payment [Terms and Conditions](#)

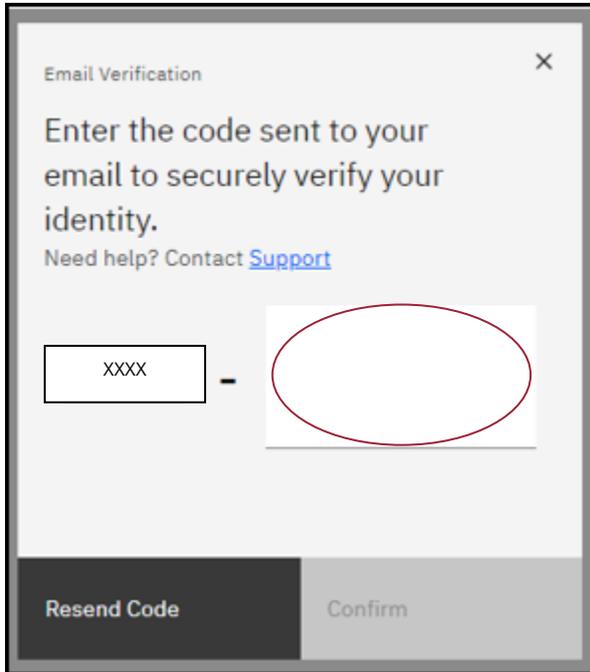
19. The supplier will continue through the two-step authentication process.



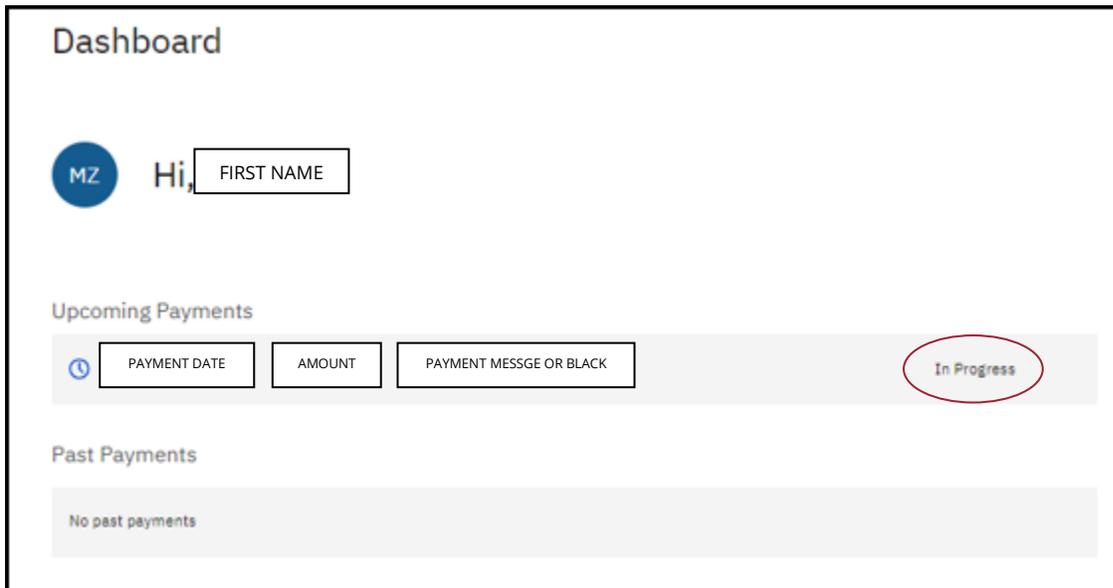
20. The supplier must check their email for an email containing a 4-6 digit verification code.



21. Supplier will enter in the 6 digits after the hyphen. Supplier will click "CONFIRM".



22. Supplier will be returned to the RSP portal. The Upcoming Payments section will update from “ACCEPT PAYMENT” to “IN PROGRESS”



23. Each payment method has its own processing timeframe. The supplier can expect the funds:

- b. Zelle typically within 1 hour but can take up to a day
- c. PayPal typically within 1 – 5 hours but can take up to a day
- d. Bank Transfer / Direct Deposit (ACH) 1-3 business days