

Tipalti Banking Information Invitation

The Rockefeller Foundation is partnering with Tipalti, a global payment automation service for all of our banking information collection, invoice submission, and payment processing. Please note that registration in the Tipalti payment platform is mandatory for all RF payees.

During the granting approval process, the individual at your organization identified as the Banking Contact will receive an invitation to register via email with a secure registration link which has been securely coded for access exclusive to that email address.

The registration sections are outlined below. This [4 minute video on the Tipalti Self Service Portal Experience](#) and [“FAQs”](#) provide a helpful guide on how to register. Please be advised that inaccurate information will cause delays in payments being processed to you. If you have any questions, or if you are not the appropriate person at your organization to complete this information and we need to reassign the registration link to someone else, please contact procurement@rockfound.org for assistance.

1. Contact Details

- Name
- Address
- Email
- Phone

2. Payment Details

- Payment method
- Currency selection*
- Routing and account numbers*
- PayPal account*

*based on payment method chosen

3. Tax Identity

The portal will guide you towards selecting the right tax forms (W-9, W-8, EIN, SSN, etc.) and walk you through the information gathering process.

After registering your payment information in Tipalti, please continue to submit all other deliverables and reports through the Rockefeller Grantee Portal.

We are excited to offer you a payment system that is best-in-class and are dedicated to making this transition as smooth as possible. If you have any questions, please contact procurement@rockfound.org.

Required Documentation

- A short **proposal** from the Grantee describing the need for additional funding and the activities to be supported.
- An updated **budget** from the Grantee with the Original Amount column, a Change column, and an Amended Budget Amount column.
- **Funding Increase Amendment Memo** by the Program Team including rationale, and an updated deliverables table and payment schedule.