

CANDEX[®]

February 2025



Agenda

- Introductions – Why we're here!
- What is Candex and Why Candex?
- Benefits of the program
- Honorarium and associated Expense Reimbursement
- Quick Demo
- Questions

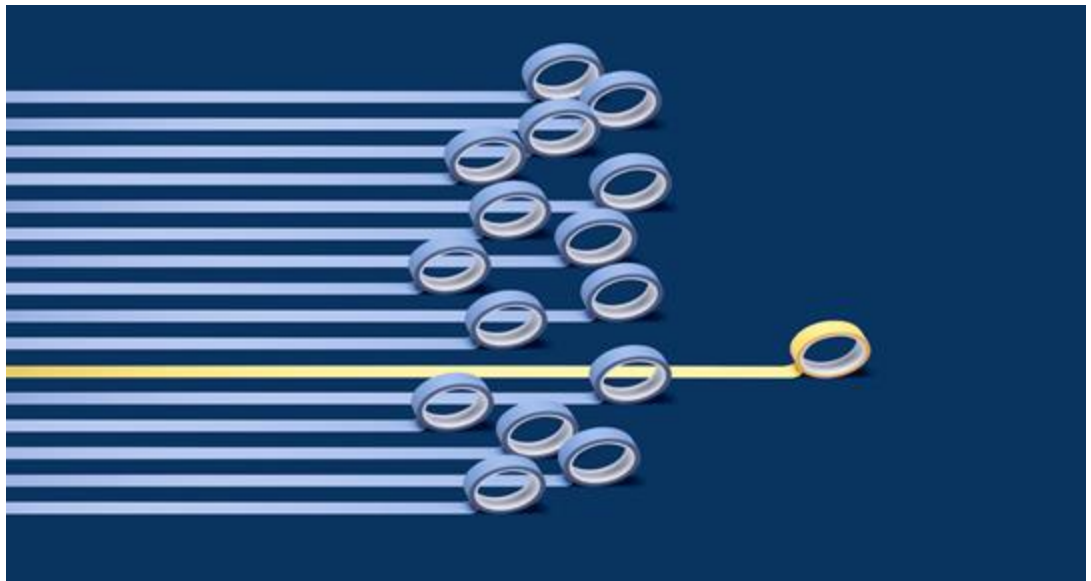


What is Candex?

Candex is a payment software and service provider that facilitates payments to individuals or companies.

You can use Candex to pay **Honoraria with expense reimbursement** for a Lecturer, Seminar, or Guest Speaker, in accordance with Columbia's [Honorarium Policy](#).

Candex will go “live” and be available to the University on February 24th 2025.



Why Candex?

Feedback from users said that the PaymentWorks process was onerous for small and one off vendors



Extremely Fast

No need to set up vendors



Happy Vendors

Easy to get paid



Fully Compliant

Meets organizational requirements

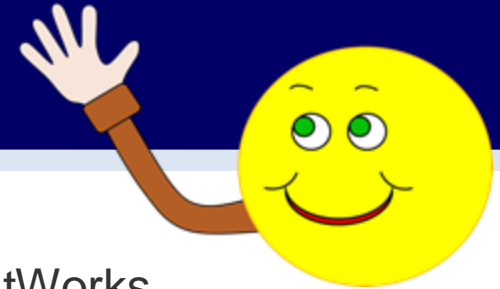
How does Candex work?



Benefits of Candex

- Candex is an enabled Supplier in the CU Marketplace. PunchOut to enter payment information and invite your payee to register with Candex
- The payee doesn't have to go through the PaymentWorks process, Candex does all the vetting and is fully compliant
- Multiple languages are available for payees
- Payees can self service in their Candex account and view their payment status
- Payments are made in 72 hours
- You can see the PO status in the CU Marketplace
- Annual IRS Tax Reporting

More on Candex!



What does this mean for the individual I want to pay?

- They do not need to be registered as a supplier in PaymentWorks.
- They will receive an email from Columbia University via Candex which contains an invitation to register with Candex and complete their payment and banking details.
- They will be paid electronically and will no longer need to wait for a check to be cut.

What do you need to do differently to implement this change?

If you are experienced in the CU Marketplace, everything will be familiar! Candex is an enabled vendor in the CU Marketplace. Punchout to Candex, submit your requisition with supporting documentation, and Candex and the payee will do the rest! *Inform the payee that they will be receiving an invitation from Candex.*

[Paying Honoraria Quick Guide](#)

Honorarium Reminders!

An honorarium payment is a payment made as an expression of thanks or recognition for engaging in a University sponsored activity.

Common examples are:

- Guest lecturers, speakers or panelists participating in a campus symposium.
- Awards to an individual for a special achievement or renown for participation in a short-term activity or event that is of an educational, research, or public service nature and no-specific deliverable or specific result is requested or expected (anything with an invoice is not an honorarium).

Honorariums cannot be given to employees and students of Columbia University.

Honorariums cannot be given to companies.

They are always taxable and reportable at \$600 or more.

Documentation must include a memo and/or flyer describing the event, business purpose, and the reason for payment.

Honorarium with Expense Reimbursement

An expense reimbursement associated with an honorarium should be on the same requisition as the honorarium.

An expense reimbursement associated with an honorarium submitted using Candex must follow the University's Travel and Business Expense policy, except the following:

- Alcohol will not be reimbursed.
- Excess expenses over policy thresholds will not be reimbursed.
- Airfare should be booked by a travel arranger using Concur or WTI.

In Candex, click the link to download the **Expense Reimbursement Form**. You must acquire the payee's receipts and complete the form. Click the checkbox for **I have completed the Expense Reimbursement Form and will attach it to the requisition**.

The Non-Employee Expense Reimbursement form and receipts must be attached to the requisition in Jaggaer for review.

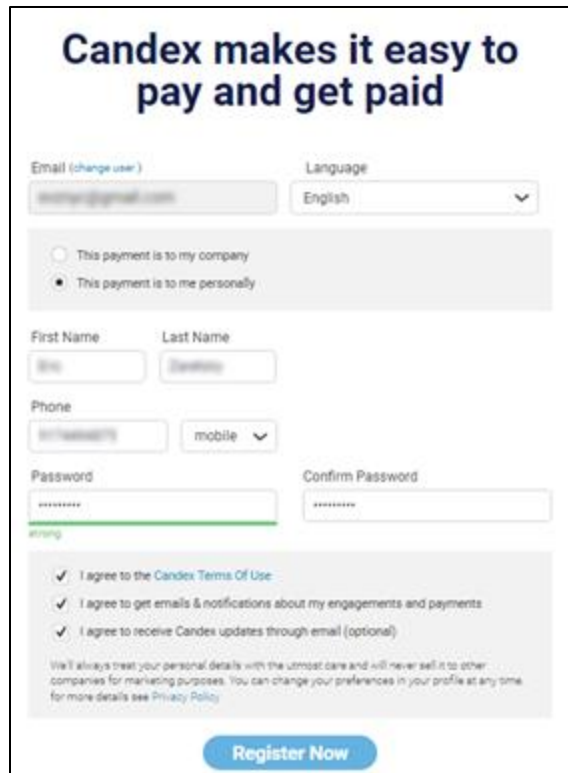
Note: For payments or reimbursements to foreign payees refer to the [Payments to Foreign Nationals and Entities Policy](#) and the associated [Allowable Payments by Visa Type Chart](#).

CANDEX DEMO



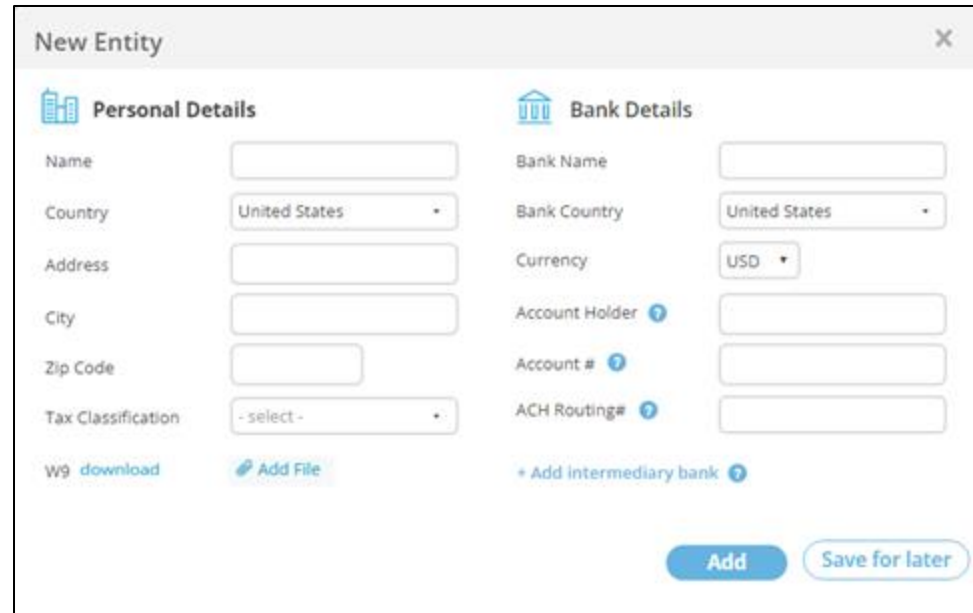
The Candex Payee Experience

Registration form:



The registration form features a header with the text "Candex makes it easy to pay and get paid". Below this, there are input fields for "Email (change user)" and a "Language" dropdown menu set to "English". A section with two radio buttons allows the user to select if the payment is for a company or personally. Further down, there are fields for "First Name", "Last Name", "Phone" (with a dropdown for "mobile"), "Password", and "Confirm Password". A green progress bar indicates the current step. At the bottom, there are three checked checkboxes for terms of use, email notifications, and email updates, followed by a "Register Now" button.

Personal and Bank Details form:



The "New Entity" form is divided into two columns: "Personal Details" and "Bank Details". The "Personal Details" column includes fields for Name, Country (set to "United States"), Address, City, Zip Code, and Tax Classification (set to "- select -"). There is a "W9 download" link and an "Add File" button. The "Bank Details" column includes fields for Bank Name, Bank Country (set to "United States"), Currency (set to "USD"), Account Holder, Account #, and ACH Routing#. There is a link to "Add intermediary bank". At the bottom right, there are "Add" and "Save for later" buttons.

Payee Guide: [Receiving a Columbia University Honoraria Payment via Candex](#)

More Information

For assistance or questions regarding your Candex Request:

- log a self-service Incident with the Finance Service Center with the subject “CU Marketplace Candex”
- [Honorarium Policy](#)
- [Making Payments with Candex Webpage](#)
- [Paying Honoraria Quick Guide](#)
- [Payee Guide for Candex](#)

Thank you for your time and input!



Questions

