

# Columbia University Finance Training

## Receiving a Columbia University Payment via Candex

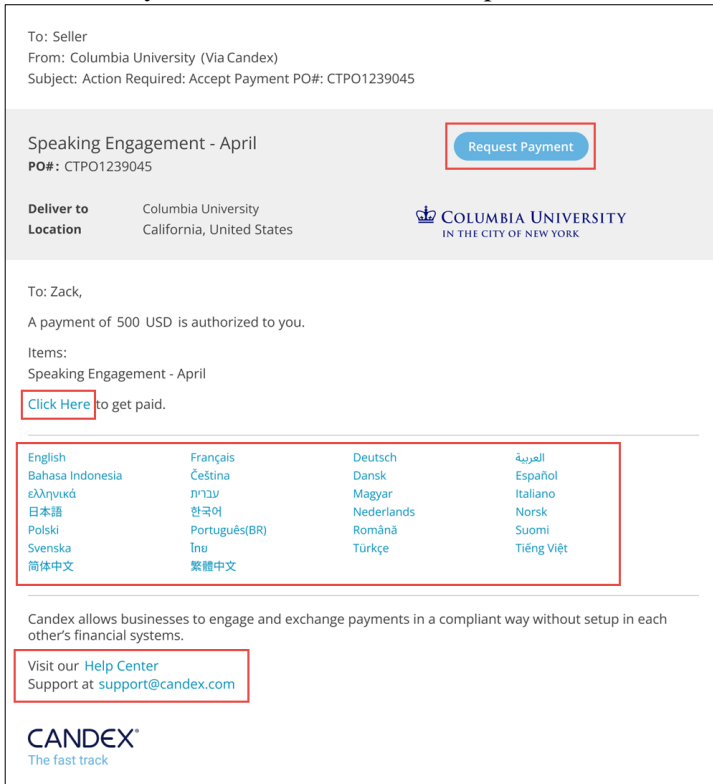
If you are receiving a monetary prize or award, honorarium or a related expense reimbursement from Columbia University, you will be invited by a Columbia University employee to register with Candex and enter your payment details. Candex provides expedited payments through a simplified, secure, and transparent process. If you are to receive an expense reimbursement as part of your payment, please provide receipts to your Columbia University contact for the expenses you incurred.

### Creating a Candex Account

You will receive an email invitation from Columbia University (via Candex) asking you to create a Candex account and complete your payment information.

1. To start the process, click the **Request Payment** button or the **Click here** link in the email to begin. Or, if necessary, you can select from a choice of languages.

In addition, you can visit the [Candex Help Center](#) or email [Candex Support](mailto:Candex Support) for help.



The Candex Registration Web-page appears, which is to be filled out ONLY on initial engagement

The screenshot shows the Candex registration web page. The header includes 'CANDEX' and navigation links: 'How it Works', 'For Buyers', 'For Sellers', 'About', and 'Sign In'. The main heading is 'Candex makes it easy to pay and get paid'. The registration form includes fields for 'Email' (zack@miller.com), 'Language' (English), and radio buttons for 'I am being paid to my company' and 'I am being paid as an individual'. There are also fields for 'First Name', 'Last Name', 'Phone', and 'Select'. Below these are 'Password' and 'Confirm Password' fields. At the bottom, there are two checkboxes: 'I agree to the Candex Terms Of Use and Privacy Policy' and 'I agree to receive Candex updates through email (optional)'. A red box highlights the 'Register Now' button.

You can select a **Language** from the dropdown.

2. Select whether I am being paid to my company or I am being paid as an individual.

I am being paid to my company

I am being paid as an individual

The form will change depending on the selection.

3. Complete the required fields for the payment you selected.

*Personal payment:*

**Candex makes it easy to pay and get paid**

Email:  Language:

I am being paid to my company  
 I am being paid as an individual

First Name:  Last Name:  Phone:

Password:  Confirm Password:

I agree to the [Candex Terms Of Use and Privacy Policy](#)  
 I agree to receive Candex updates through email (optional)

[Register Now](#)

*Company payment:*

**Candex makes it easy to pay and get paid**

Email:  Language:

I am being paid to my company  
 I am being paid as an individual

First Name:  Last Name:  Phone:

Company:  Job Title:

Password:  Confirm Password:

Are you a small business?  Yes  No

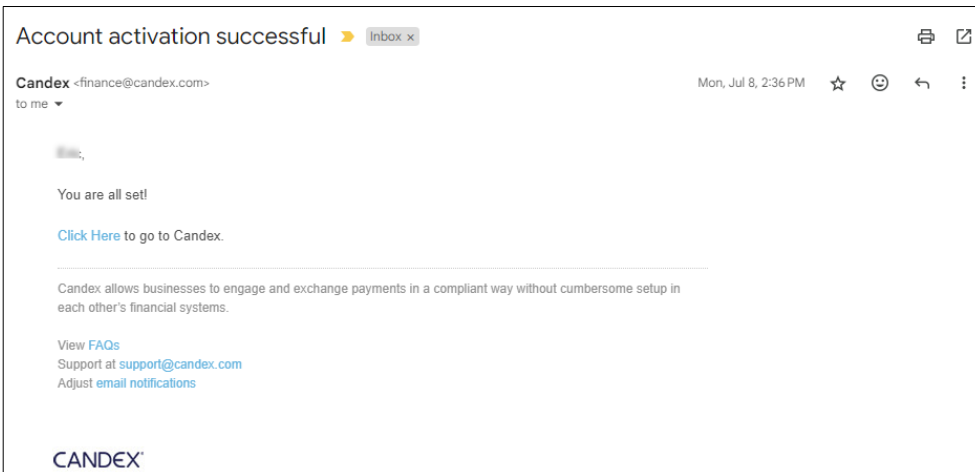
Are you a diverse business?  Yes  No

I agree to the [Candex Terms Of Use and Privacy Policy](#)  
 I agree to receive Candex updates through email (optional)

[Register Now](#)

4. Select to **agree to the Candex Terms of Use and Privacy Policy** and click the **Register Now** button.

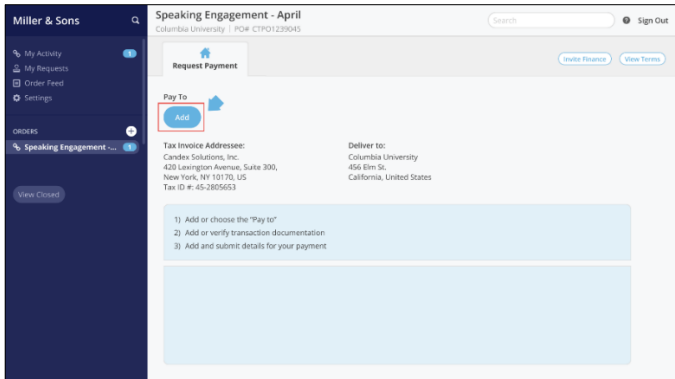
You will receive a verification email.



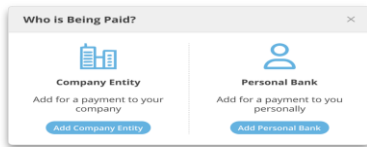
After registering, the Candex Request Payment screen appears.

## Completing Your Payment Details

1. Click the **Add** button.

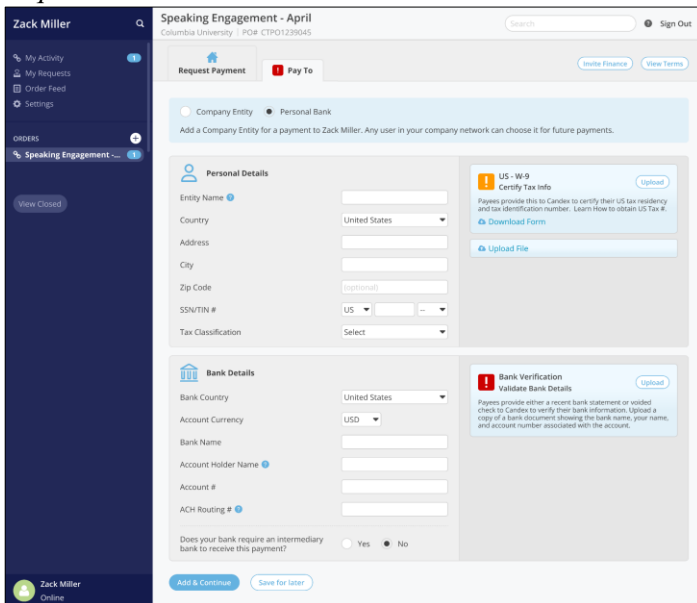


The Who is Being Paid? window appears.



2. Select the **Add Company Entity** (if payment is going to your company) or **Personal Bank** (if payment is going to you). The Pay To tab appears for you to add payment details.

**Note:** If you work for a Company Entity that has a finance professional, team, or department, you can click the Invite Finance button from the upper right corner to invite a finance colleague to assist you with the Payment Request.



- For US citizens and legal residents, you must upload a completed **W9** form.
  - If you are a foreign resident, you must upload a completed **W8** form.
- Blank forms are available from **Download Form** link. If needed. Click the **Upload File** link to upload the appropriate completed form.

2. Complete the fields for **Personal Details** and **Bank Details**.

3. Click the **Add & Continue** button.

If you are a non-US person or work for a non-US entity, the Withholdings tab appears. If you are a US Entity, the Request Payment screen appears.

## Completing Withholding Information for a Non-US Person or Entity

When a non-U.S. person or entity performs services physically in the U.S., withholding applies. If you are a non-US entity the Withholdings automatically tab appears after completing your payment details and clicking the Add & Continue button.

Miller & Sons | Speaking Engagement - April | Zebra | PO# CTP01239045 | Search | Sign Out

Request Payment | **Pay To** | Withholding | Invite Finance | View Terms

Answer below questions to determine the required transaction documents.

**Service Location**

How much of this service was performed physically in the United States?  All  None

How much of this service was performed physically in the California?  All  None

**Withholding Calculations**

**United States** Applicable WHT Rate: 15%

Will you make any claims to reduce US Withholdings?  No  Yes, for personal services  Yes, for passive income  Yes, this is ECI (effectively connected income)

Choose Application Rate: 15%

**California** Applicable WHT Rate: 7%

\* \$1,500 per calendar year is exempt from this tax

Will you make any claims to reduce CA Withholdings?  No  Exempt  Reduced

Direct Expenses Claimed: 500 USD

**US - 8233 Reduce US Withholdings** [Upload]

On personal services, individuals use to certify foreign tax residency and claim treaty benefits to reduce or eliminate withholdings. Though you may request payment without this file, Candex must validate with IRS before payment is made. Learn How to obtain US Tax #.

[Download Form](#)

**CA - FTB 589 Determination Reduced WHT Decision** [Upload]

Payees submit this form to the CA FTB here. The "FTB 589 determination" is a certified response from the CA FTB. Payees provide the determination to Candex and we will allow for its reduction.

[Download Form](#)

Save & Continue

1. Select the answers to the questions regarding **Service Location** and **Withholding Calculations**.
2. Required documents are available in the relevant right-hand sections for download. You must complete and upload the applicable forms.
3. Click the **Save & Continue** button. The Request Payment screen appears.

## Submitting Your Request

Miller & Sons | Speaking Engagement - April | Columbia University | PO# CTP01239045 | Search | Sign Out

Request Payment | **Pay To** | Invite Finance | View Terms

Pay To: Miller & Sons, LLC (US/USD) | Citibank \*\*\*\*\*291

Tax Invoice Address: Candex Solutions, Inc., 420 Lexington Avenue, Suite 300, New York, NY 10170, US | Tax ID #: 45-2805653

Deliver to: Columbia University, 456 Elm St, California, United States

Item (USD)	Amount	Tax
Speaking Engagement - April By: Apr 1 To: US	500	-

Amount: 500 USD  
Tax: -  
Total Invoice: 500  
Withholding: (150)  
Net Due: 350

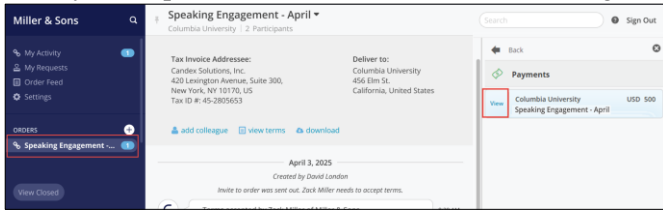
Get Paid | Skip for now

Click the **Get Paid** button on the Request Payment screen.

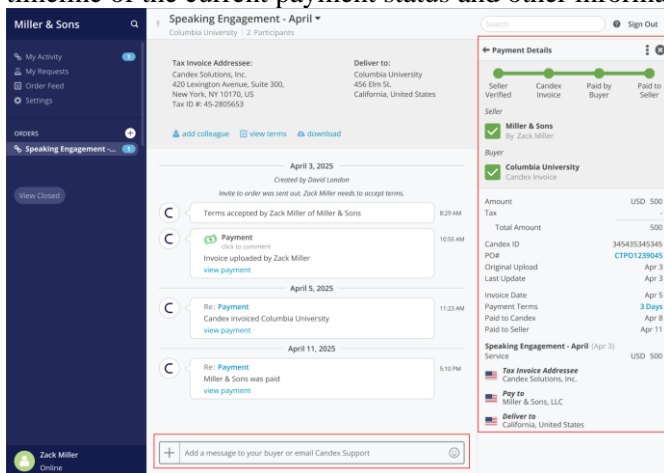
### Checking Your Payment Status

After you submit your request, you can use Candex to view the status of your payment.

1. Log on to Candex.
2. Click your request from the **Orders** list in the Navigation pane on the left side of the screen to display your request.



3. Click the **View** button from the Payments panel on the right side of the screen. The Payment Details panel displays a timeline of the current payment status and other information about your payment.

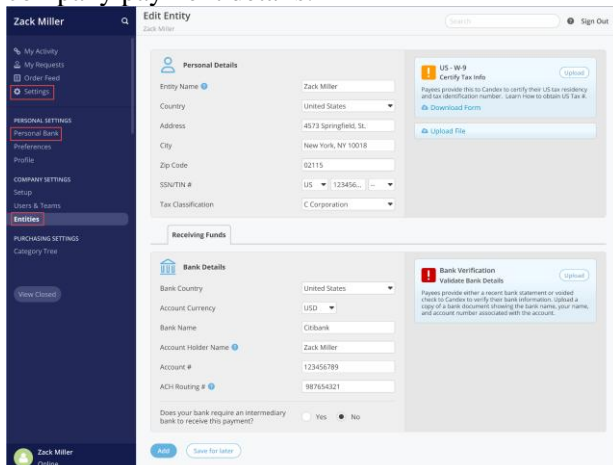


If you have any questions or need help regarding your payment, you can message Columbia in the **Add a message to your buyer or email Candex Support**.

### Editing Personal or Entity Details

You can update Personal or Company Entity Details, such address and banking details.

1. Log on to Candex.
2. Click the **Settings** menu from the left navigation panel.
3. Click **Personal Bank** to edit your personal payment details or click **Entities** to update your Company Entity your company payment details.



4. Click **Save for later**.