Columbia University Finance Training

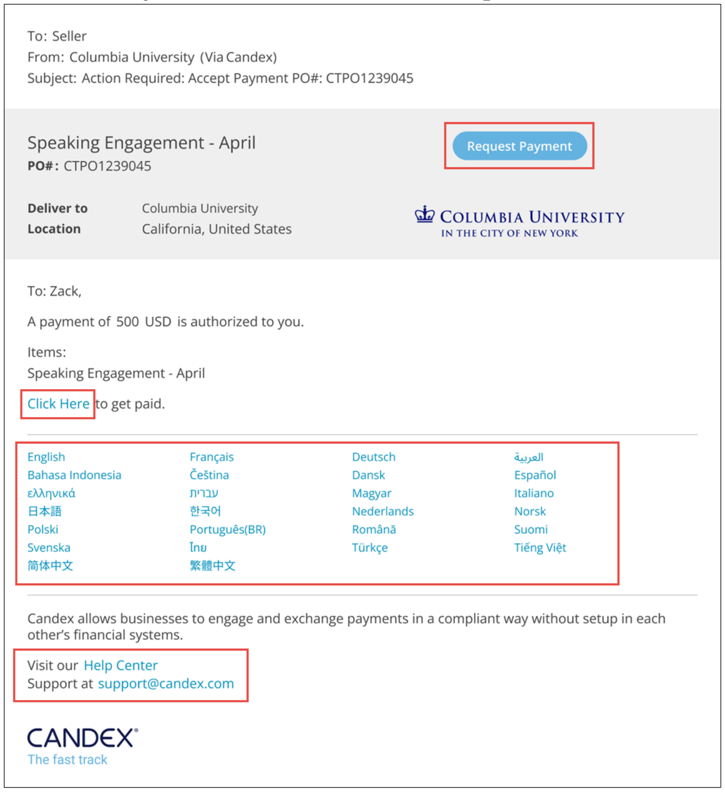
Receiving a Columbia University Payment via Candex

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.

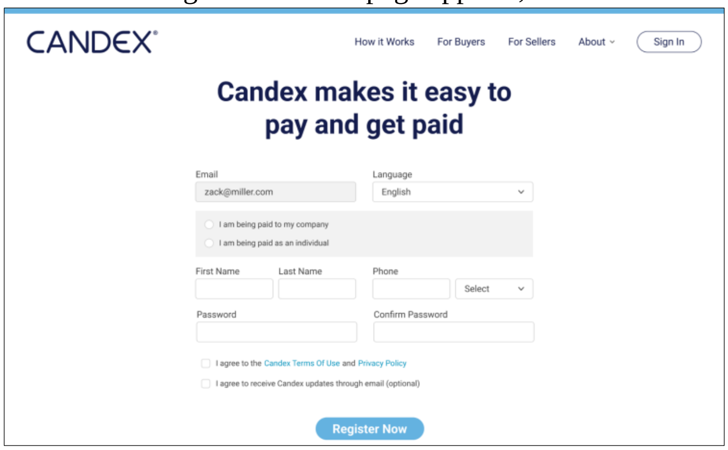
Creating a Candex Account

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 for help.



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



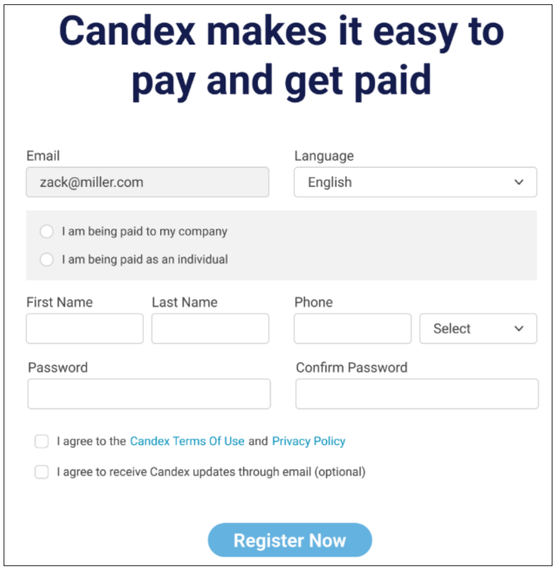
You can select a **Language** from the dropdown.

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

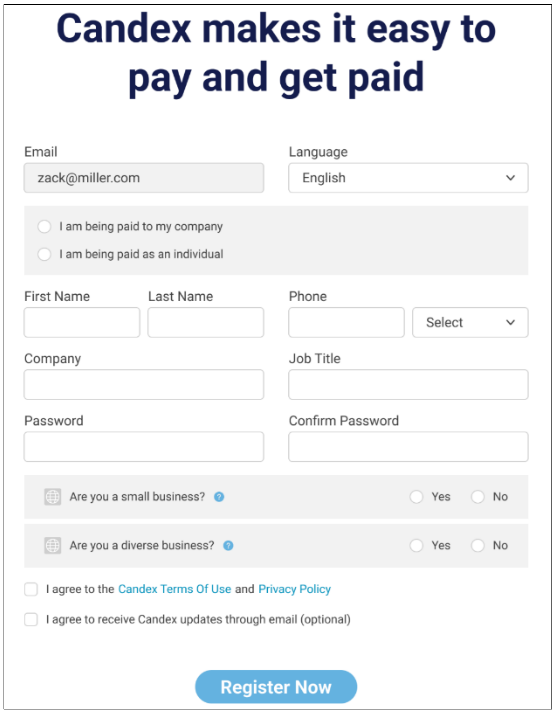
The form will change depending on the selection.

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

Personal payment:

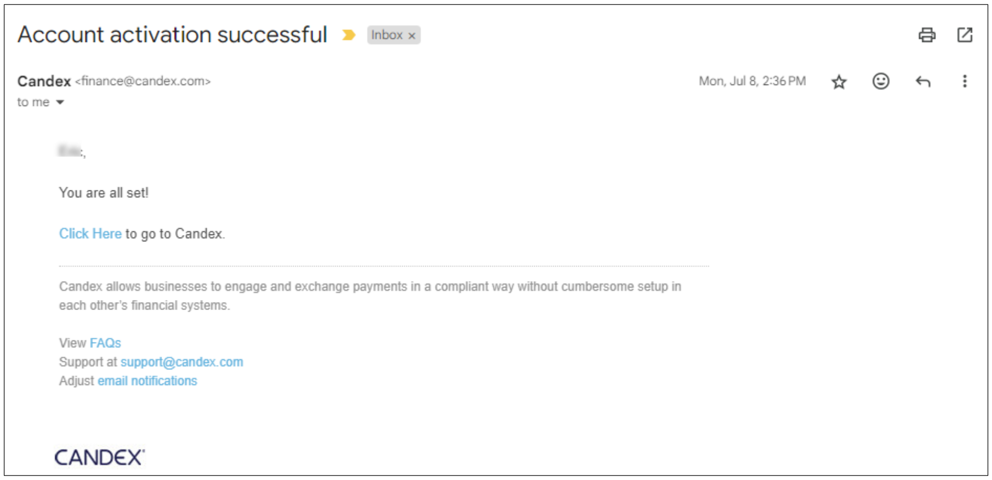


Company payment:



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

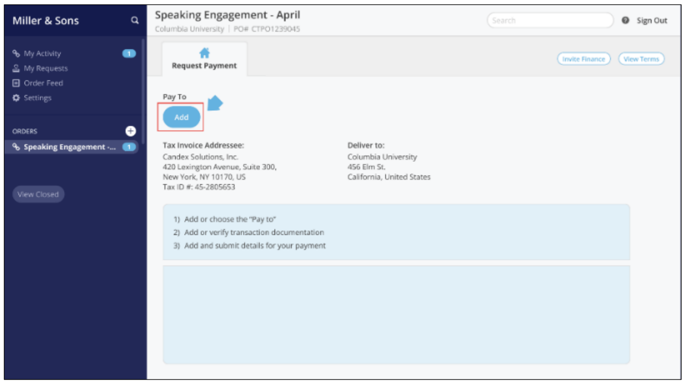
You will receive a verification email.



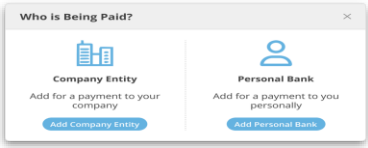
After registering, the Candex Request Payment screen appears.

Completing Your Payment Details

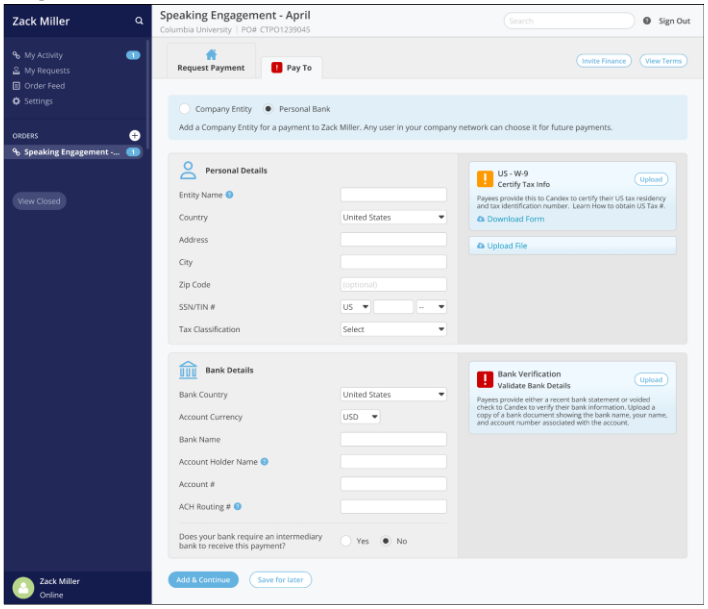
1. Click the **Add** button.



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*.

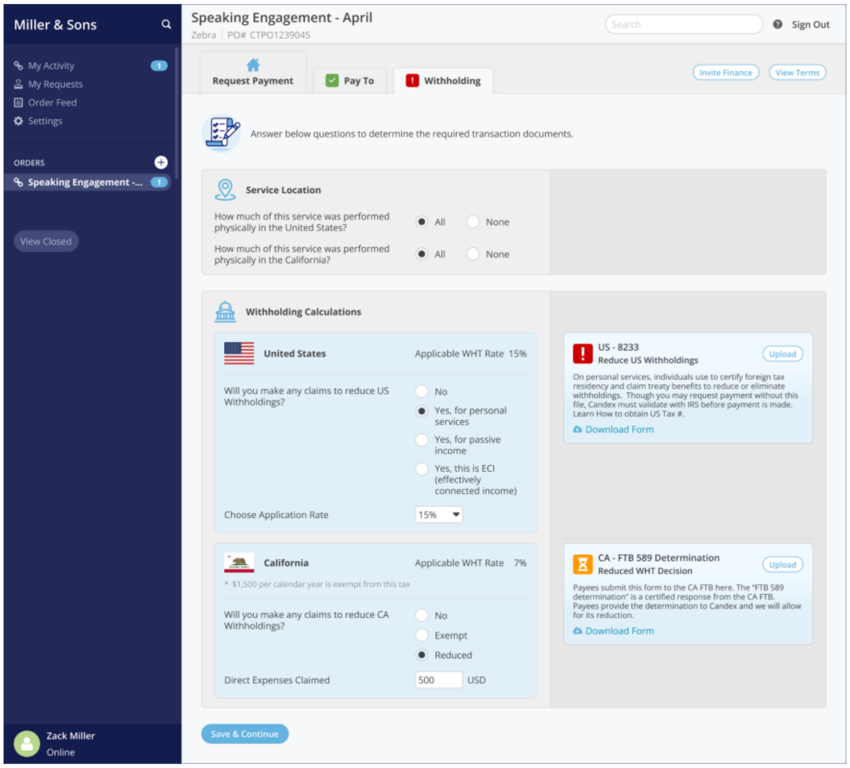


- For US citizens and legal residents, you must upload a completed **W9** form.
- If you are a foreign resident, you must upload a completed **W8** form.
  Blank forms are available from **Download Form** link. if needed. Click the **Upload File** link to upload the appropriate completed form.

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.

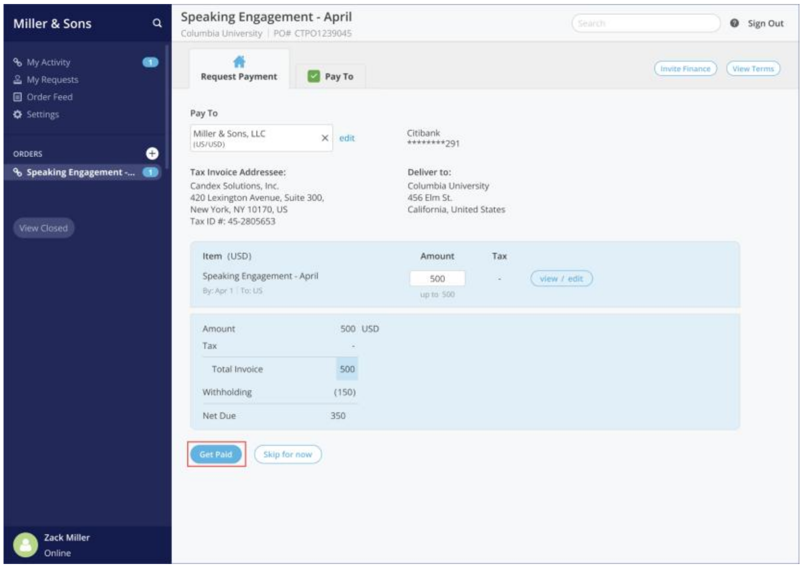
Completing Withholding Information for a Non-US Person or Entity

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.



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

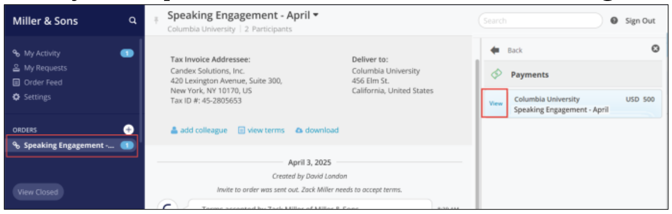


Click the **Get Paid** button on the Request Payment screen.

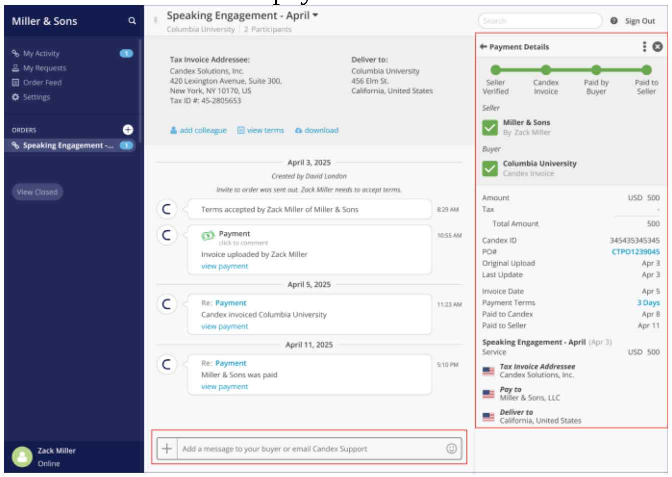
Checking Your Payment Status

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.

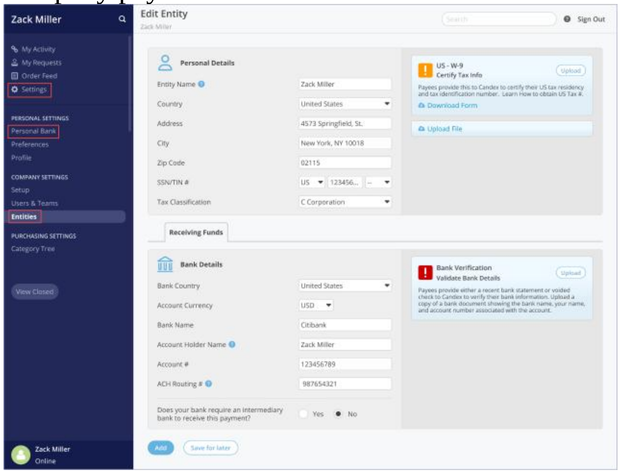


If you have any questions or need help regarding your payment, you can message Columbia in the **Add a message to your buyer or email Candex Support**.

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**.