

Making Payments with Candex Quick Guide



This Quick Guide covers how to create a Requisition for a monetary Prize, Award or Honoraria payment, and how to include an expense reimbursement associated with a payment in the CU Marketplace utilizing Candex.

For information, refer to the [Policy for Making Payments with Candex](#) and the [Making Payments with Candex website](#).

Refer to the [Payments to Foreign Nationals and Entities policy](#) and the associated [Allowable Payments by Visa Type Chart](#) to ensure that a payment can be made.

You must have the Procurement Initiator role in order to create the Requisition.

1. Launching Candex from the Marketplace

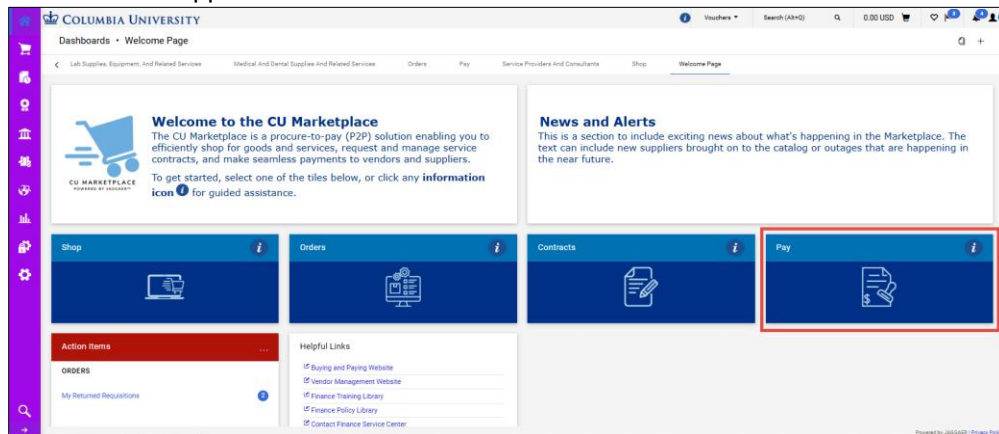


Access Candex from the CU Marketplace to submit a Requisition for a Prize, Award, or Honoraria payment.

1. Navigate to the [Procurement Paying](#) website, click the **CU Marketplace** logo, and login using your Single Sign On.

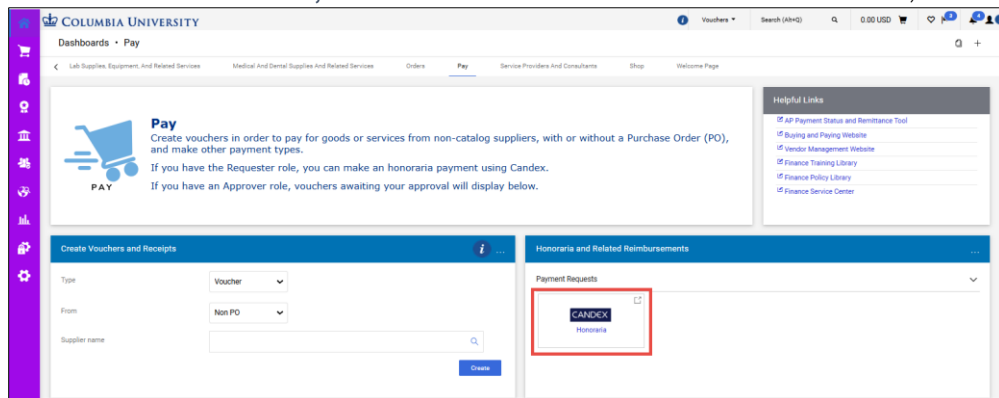


The JAGGAER application launches.



Note: The CU Marketplace will automatically time out after thirty minutes of inactivity, consistent with other University Enterprise Systems.

2. Click the **Pay** tile. The Pay dashboard appears.
3. In the **Prizes and Awards, Honoraria and Related Reimbursement** section, click the **Candex** tile.



You will then “PunchOut” to the Candex website.

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2. Entering Payment Details



Notice the gray bar at the top of the Candex website indicates that you are punched out from the Marketplace. You can click the Cancel PunchOut button to return to the Marketplace, if needed.

1. Select type of payment from the **Category** dropdown.
2. Enter the **Description** for the payment.
3. Enter the payee's **Payee Email** address. The email address must be for a specific person, not a general mailbox.

After selecting the Category, the Amount field will appear.

4. Enter the **Amount**. Honoraria, prizes, and awards may require withholding when annual payments reach \$2,000 for U.S. individuals or any amount for foreign individuals; withholding is processed through Candex.
5. Enter the **Payee Name**.
You can type optional **Comments**.
6. Click the checkbox **I have read the Allowable Payments by Visa Type and acknowledge recipient qualifies for payment**, which is required to checkout. You can click the link to review the table on the website.

I have read the Allowable Payments by Visa Type [here](#) and acknowledge recipient qualifies for payment.

7. Click **Checkout** to complete Requisition details or click **Add Line-Item** to add an additional payment to your Requisition.

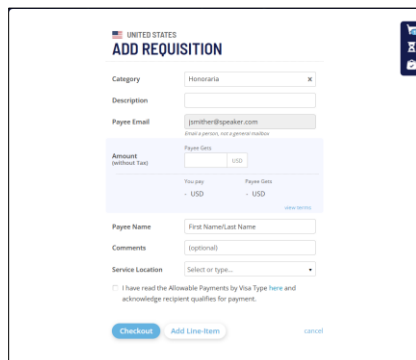
You can send your payee the [Receiving a Columbia University Payment via Candex](#) guide to assist them in registering.

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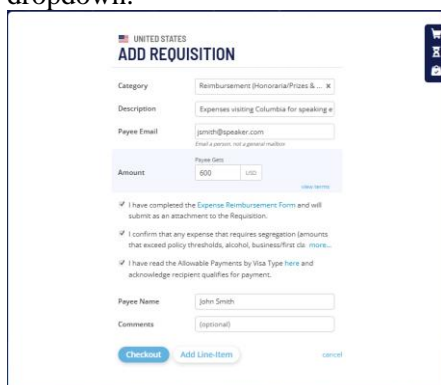
2. Entering Payment Details

Adding a Reimbursement

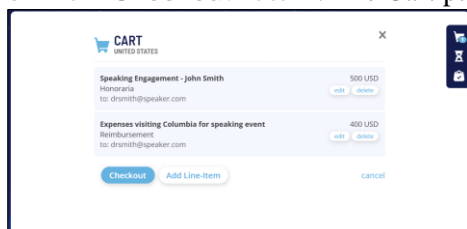
After clicking the Add Line-Item button, the Cart icon will show that you have 1 item. The form will be ready for you to enter a new item.



1. Click the **X** icon to remove Prize, Award, or Honoraria from the Category field and select **Reimbursement** from the dropdown.



2. Enter the **Description** that explains the business reason for the reimbursement.
3. Enter the **Payee Email**.
4. Enter the **Amount**.
5. Click the link to download the [Expense Reimbursement Form](#).
See the instructions in the Submitting the Requisition section on how this form must be completed.
6. Click the checkboxes for the following:
I have completed the Expense Reimbursement Form and will submit as an attachment to the Requisition
I confirm that any expense that requires segregation is not part of this Requisition.
I have read the Allowable Payments by Visa Type and acknowledge recipient qualifies for payment.
7. Enter the **Payee Name**.
You can also enter optional **Comments**.
8. Click the **Checkout** button. The Cart page appears.



8. Click the **Checkout** button.

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3.

Submitting the Requisition



At checkout you must ensure that the Ship To/Bill To Addresses and the ChartString information is complete and correct. If you created default values in your Profile (refer to the [Modifying Profile Settings in the CU Marketplace job aid](#)), those values will be populated. You must attach documentation describing the business purpose and reason for payment. If you are including a Reimbursement, you must also attach the [Expense Reimbursement Form](#) and the payee's Receipts

1. On the Shopping Cart page, click the **Proceed to Checkout** button.

The Checkout screen appears displaying the Requisition. If you have multiple payments, for example, both an Honorarium and Expense Reimbursement, the Requisition will have two lines; one for the Honorarium and the other for the Reimbursement.

The **Status** panel on the right indicates all the required information you must complete. You can click the link to access the field to update it. Fields within the form that require completion will be labeled Required.

2. Complete the **Shipping/Billing** Addresses and **Accounting Codes** as needed. Refer to the [CU Marketplace Initiator Quick Guide](#) for instructions.

Note: The Ship To and Bill To addresses should be entered as the Procurement Initiator's department address and not the Payee's address. The Payee enters their address when they register in Candex.

3. Click the **Attachments** tab to upload the required documentation describing the business purpose and reason for payment.

Click the **Add Internal Attachment** button to upload your document.

4. Click the **Place Order** button.

The Cart is now entered as a Requisition into approval workflow.

After the Requisition is approved and the Purchase Order is issued, the payee will receive an email from Columbia University via Candex, which contains an invitation to register with Candex, complete their payment and banking details, and upload their W-9 or W-8 form.

Candex will pay the recipient. If the payment is for both a Prizes and Award or Honoraria and Expense Reimbursement, the payee will receive two separate payments; one for the Honorarium and the other for the Reimbursement.