



Candex User Guide

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Candex

Candex is Tulane's new punchout to process for student, speaker and guest reimbursements. This is **not** for vendors, faculty, or staff payments or reimbursements.

Staff and Faculty who are also students should submit reimbursement requests through the expense module.

Who can be paid with Candex?

Alumni- business entertainment, conference fees, travel reimbursements- both domestic and foreign, recruitment expenses.

Guest Artists- examples are musicians, dancers, or actors. Any guest artist who signs a contract is a vendor and should be set up as a supplier and paid through the non-catalog requisition/PO process.

Guests- business entertainment, conference fees, travel reimbursements- both domestic and foreign, recruitment expenses.

Honorariums- remember that Tulane employees are not eligible for honorariums

One Time NSR Stipends- these are for non-Tulane students or one time NSR payments to Tulane students. Tulane students receiving multiple payments in a semester should follow the process through Financial Aid and Student Accounts.

Participant Support- This is for support given to study participants- examples could be paying a participant's Entergy bill or transportation to the study.

Speakers- like guest artists. If speaker signs a contract, they should be set up as a supplier and paid through the non-catalog requisition/PO process.

Students- business entertainment, conference fees, travel reimbursements- both domestic and foreign, recruitment expenses, academic prizes and awards (including travel or summer grants), and reimbursement for books, publications, subscriptions or supplies/operating expenses.

Study Participants- payment directly to the participant for participation in the study.

Trainees- misc. expenses, stipends or travel

What is the process to use Candex?

1. Notify the payee that they will be paid through Candex (see stock letter).
2. Set up the payment through the punchout located in Procurement.
3. Allocate and submit the requisition.
4. Once all approvals are obtained, the requisition will become a PO.
5. The PO is sent to Candex.
6. Candex will reach out to the payee.
7. The payee will create an account with Candex and add their billing details (Tulane employees no longer need to obtain contact information nor W9 forms for these payments).
8. Candex will invoice Tulane.
9. Tulane will pay Candex.
10. Candex will pay the payee.

*****TIP***** Do not process more than 3 recipients on one requisition/cart to streamline approval. Delayed approvals may take up to 14 business days.

How to process a payment

From WaveWorks go to the Procurement tab.	Procurement
Click on	 Purchase Requisitions (RSSP)
Click on Candex.	
Choose a Category.	Category <input type="text" value="Student Reimbursements Supplies/O... x"/>

Enter a Description.

Description

The description should include the payee name, email address, and student status (faculty and staff who are also students should **not** be reimbursed here)

Enter the payee email.

Payee Email

Email a person, not a general mailbox

A Tulane email is acceptable for students

Enter the payment amount.

Amount

Payee Gets

 USD ▾

Enter an Event Date, if applicable.

Event Date

MM-DD-YY

Choose the Status.

Citizen/ Permanent Resident

Select or type...

Check any applicable boxes and make sure to follow those directions.

- Travel/event agenda, [reimbursement form](#), and receipts must be attached to the requisition in WaveWorks.
- Receipt showing proof of payment must be attached to requisition in WaveWorks.
- I have added the name of the Payee in the description above.

These attestations may change depending on category

Attachments are done in WaveWorks not here in Candex

Add Additional Line Items.

Checkout

Add Line-Item

Each expense category requires a line (example the total travel reimbursement can be one amount in that category)

Do not break out by individual expense i.e. do not add each meal or uber

Checkout.

Checkout

Add Line-Item

Click on the pencil next to the Requisition Summary

Requisition summary



Enter a brief description.

Description

Category descriptions- reimbursement, honorarium, award, or one-time payment

Add a Justification if applicable.

Justification

These comments are just for Tulane approvers

Update the Deliver-to-Location if needed.

Delivery

Requested Delivery Date
04/17/2026



Deliver-to Location
Poydras Street Bldg

This field needs to match the delivery address in the Additional Information

Enter either the GL, Non-Sponsored, or Sponsored Project in the **appropriate** field.

Project costing

Project Number

Charge account

Charge To
364900.410.75402.610.00000.0000.ER420089.00



Only use the Charge Account if the account starts with GL

If using a Sponsored Project, make sure to add the RASU details on the line item

See the How to Check Out section of the guide for more information

Budgetary control should be today's date.

Budgetary control

Budget Date
04/02/2026



This is the date that will appear on the budget statement

Add the recipient.

Attention to (Recipient of Package or Service) ▼

Required

This is the Tulane employee completing the requisition

****TIP**** Search is last name, first name

Add the recipient's delivery building.

Deliver-To Building Name ▼

Required

This is the building for the Tulane employee completing the requisition

This needs to match the building in the Delivery section

Add the recipient's room number.

Room Number

Required

This is the room number for the Tulane employee completing the requisition

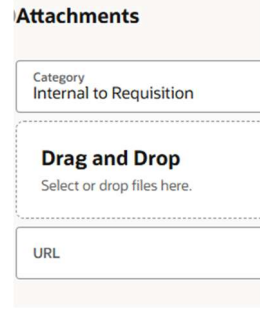
****TIP**** If delivering to JBJ, choose JBJ for the building and enter the specific building and room number here

****TIP**** If delivering to TNBRC, choose TNBRC for the building and enter the specific building and room number here

Add a note to Supplier if applicable.

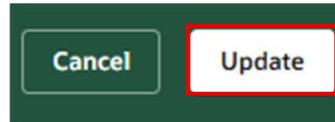
Note to Supplier

Add all attachments for the requisition here as one PDF.



The image shows a section of a web form titled "Attachments". It contains a "Category" dropdown menu with "Internal to Requisition" selected. Below this is a "Drag and Drop" area with the text "Select or drop files here." and a dashed border. At the bottom is a "URL" input field.

Click Update.

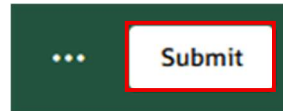


Update any line items.



This is where split allocations and adding the RASU details occur (add the RASU details everytime a Sponsored Project is used), complete those steps if applicable

Click Submit.



The three dots will allow a requisitioner to check funds, view approvers, view a pdf of the requisition or save for later

What does the process look like for the payee?

The payee receives an email from Candex.

To: Seller
From: Tulane University (Via Candex)
Subject: Action Required: Accept Payment PO#: CTPO1239045

Speaking Engagement - April
California, United States | PO# CTPO1239045



Deliver to
Tulane University

Request Payment

Zack,
A payment of 500 USD is authorized to you.
Items:
Speaking Engagement - April
[Click Here](#) to get paid.

Candex allows businesses to engage and exchange payments in a compliant way without setup in each other's financial systems.

View [FAQs](#)
Support at support@candex.com

CANDEX®

The payee registers with Candex.

Candex makes it easy to pay and get paid

Email: Language:

This payment is to my company
 This payment is to me personally

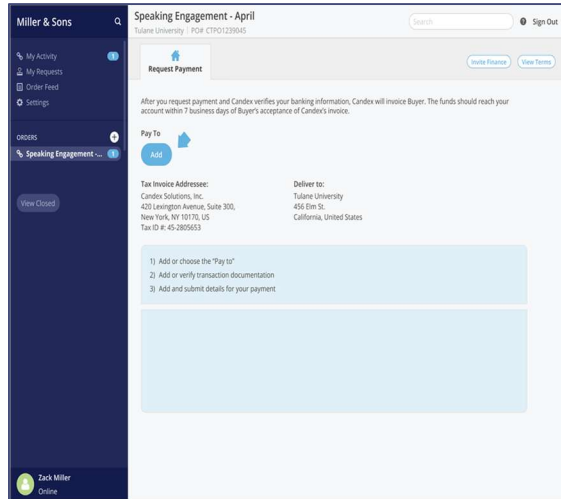
First Name: Last Name: Phone:

Password: Confirm Password:

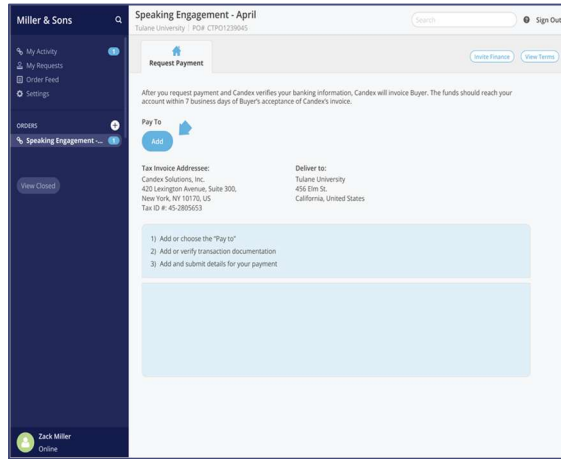
I agree to the [Candex Terms Of Use](#) and [Privacy Policy](#)

Register Now

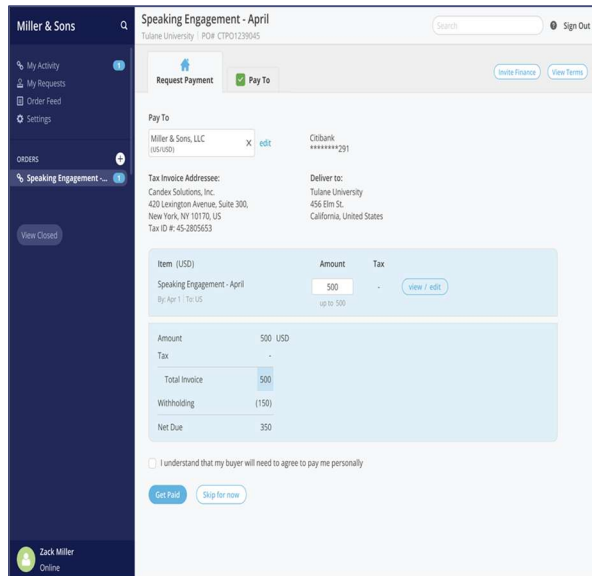
The payee begins the payment request by adding "Pay To" Details.



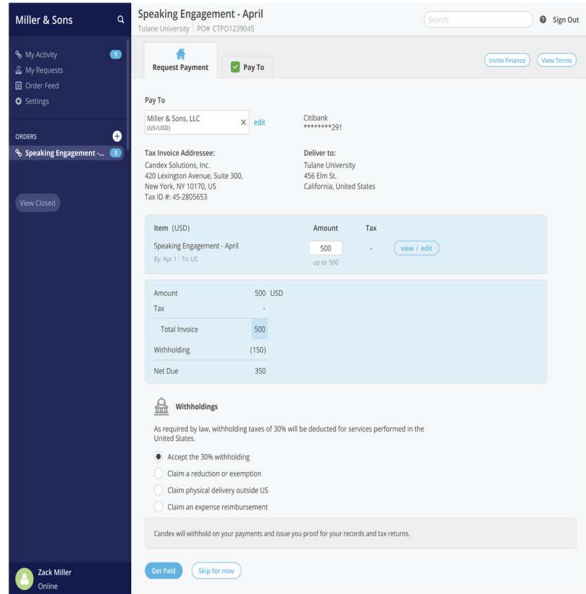
The payee adds their payment details.



The payee completes the payment request.



The payee completes the tax withholding screen.

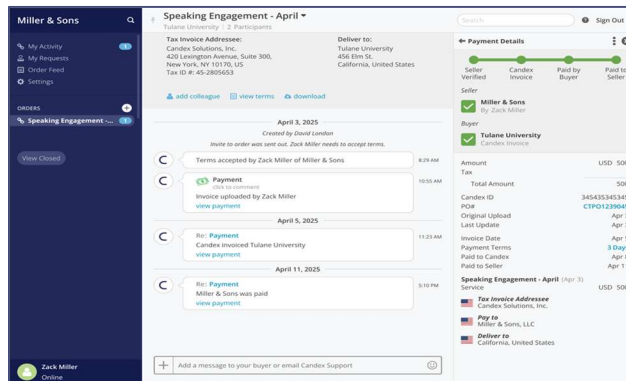


International Students should select Passive Income

To receive the 14% tax rate they will need to provide proof of F-1/J-1 status (DS-2019 or I-94)

For Tax Treaty Benefits (0% or reduced) a completed W-8BEN (including the treaty claim) and a valid US Taxpayer ID (SSN or ITIN) needs to be provided

The payee receives requisition status updates.



Payee can update their bank details at any time.

The screenshot displays the 'Edit Entity' interface for 'Miller & Sons'. The left sidebar contains navigation options: My Activity, My Requests, Order Feed, Settings, PERSONAL SETTINGS (Personal Bank, Preferences, Profile), COMPANY SETTINGS (Setup, Users & Teams), Entities, and PURCHASING SETTINGS (Category Tree). The main content area is divided into three sections: 'Entity Details' with fields for Entity Name, Country (United States), Address, City, Zip Code (optional), Tax ID # (US), and Tax Classification; 'Beneficial Owners' with a question 'Do you have any Beneficial Owners?' and a 'No' selection; and 'Receiving Funds' with 'Bank Details' fields for Bank Country (United States), Account Currency (USD), Bank Name, Account Holder Name, Account #, ACH Routing #, and SWIFT/BIC. A 'Bank Verification' warning box is present, stating: 'Payees provide either a recent bank statement or voided check for Carded to verify their bank information. Upload a copy of a bank document showing the bank name, your name, and account number associated with the account.' At the bottom, there are 'Add' and 'Save for later' buttons, and a user profile for 'Zack Miller Online'.

Draft Email for Payees

Dear _____,

We are submitting payment for you through Candex to ensure that you are paid as quickly as possible. You will receive an email from Candex to set up and complete the payment request through the Candex platform. Please note that all payment and other order terms are determined by Tulane University.

Benefits of working with Candex:

- **Fast & Simple** – only 1 minute registration and if you already have a Candex account you can just log in to complete the transaction
- **Easy & Innovative** - User-friendly portal with real-time updates and transparent payment schedule
- **Secure** - your data is protected with industry-standard security measures and encryption protocols
- **Candex has you covered** - a designated support team available to help answer your questions

How does it work:

- You will receive an email from Candex informing you that you have a payment authorization from Tulane University on the Candex platform, with a link to request your payment
- You register, accept Terms & Conditions, and add your payment details
- You submit your payment request
- Candex validates your information and runs standard compliance screening. When everything is clear, funds are transferred to you. This usually takes about a week.

Need Help?

If you need any support throughout, please feel free to reach out to support@candex.com. Please note that you can change your language settings on the platform when you register.

Should you have any questions about the process, please do not hesitate to reach out.

Employee Name

Signature